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ECONOMIC CONDITIONS IN MONTANA, 1988

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Spring 1989

TABLE OF CONTENTS

	Page
LIST OF TABLES	iv
LIST OF FIGURES	v
PREFACE	viii
ECONOMIC DEFINITIONS	ix
 CHAPTER:	
1 OVERVIEW OF THE MONTANA ECONOMY: HISTORY AND FORECASTS	1
The Early White Settlement Period, 1880-1920	1
The Period 1920-1980	1
The Period 1980-1990	2
Structural Change, 1979-1987	2
Volatility of Job Levels in the 1980s	3
Job Recovery, 1987-1988	3
Timing of Recovery by Major Industry Group	4
Job Changes in Specific Industries , 1986-1988	4
Outlook for Jobs in 1989	5
Outlook for Jobs in 1990	5
2 ECONOMIC AND DEMOGRAPHIC CONDITIONS THROUGHOUT MONTANA	11
Statewide Overview	11
Labor Force	11
Jobs and Job Growth	11
Self-Employment	13
Growth by Economic Sector	13
Agriculture	14
Mining	14
Construction	15
Manufacturing	15
Transportation and Public Utilities	16
Wholesale Trade	16
Retail Trade	16
Finance, Insurance and Real Estate	16
Services	17
Government	17
Unemployment Rate	17
Population	18
Income	19
Total Personal Income	19
Components of Personal Income	19

Nonfarm Earnings	19
Property Income and Transfer Payments	20
Farm Earnings	20
Per Capita Income and Earnings Per Job	21
Regional Analyses	
The Billings Region	48
The Bozeman Region	56
The Butte Region	64
The Glasgow-Wolf Point Region	72
The Glendive-Sidney Region	80
The Great Falls Region	88
The Havre Region	96
The Helena Region	103
The Kalispell Region	111
The Lewistown Region	119
The Miles City Region	126
The Missoula Region	134

LIST OF TABLES

1.1	Montana Non-Agricultural Wage and Salary Jobs: 1986-1988	9
1.2	Wage and Salary Employment in Montana: 1986-1987	10
2.1	Total Jobs in Montana by Region and County: 1969-1986	23
2.2	Wage and Salary Employment in Montana by Region and County: 1969-1986	25
2.3	Wage and Salary Employment in Montana Regions and Counties: 1986-1987	26
2.4	Percent Change in Total Number of Jobs by Region: 1969-1986	28
2.4a	Percent Change in Wage and Salary Jobs by Region: 1969-1986	29
2.5	Employment Growth Rates for Montana Regions	29
2.6	Wage and Salary Employment in Montana: 1986-1987	32
2.7	Unemployment Rates in Montana Regions and Counties: 1970-1987	33
2.8	Population in Montana and in Regions in Montana: Earliest Censuses to 1987	36
2.9	Total Personal Income in Montana by Region and County (Thousands of 1987 Dollars)	37
2.10	Change in Total Personal Income by Region and County (in Constant Dollars)	38
2.11	Nonfarm Earnings in Montana by Region and County (Thousands of 1987 Dollars)	41
2.12	Property Income in Montana by Region and County (Thousands of 1987 Dollars)	42
2.13	Transfer Payments in Montana by Region and County (Thousands of 1987 Dollars)	43
2.14	Farm Earnings in Montana by Region and County (Thousands of 1987 Dollars)	44

2.15	Per Capita Personal Income in Montana by Region and County (in 1987 Dollars)	45
2.16	Per Capita Income as a Percent of Montana Average by Region and County	46
2.17	Earnings Per Job in Montana: 1969-1986 (in 1987 Dollars)	47
2.18	The Billings Region	52
2.19	Wage and Salary Employment in the Billings Region: 1986-1987	53
2.20	The Bozeman Region	60
2.21	Wage and Salary Employment in the Bozeman Region: 1986-1987	61
2.22	The Butte Region	68
2.23	Wage and Salary Employment in the Butte Region: 1986-1987	69
2.24	The Glasgow-Wolf Point Region	76
2.25	Wage and Salary Employment in the Glasgow-Wolf Point Region: 1986-1987	77
2.26	The Glendive-Sidney Region	84
2.27	Wage and Salary Employment in the Glendive-Sidney Region: 1986-1987	85
2.28	The Great Falls Region	92
2.29	Wage and Salary Employment in the Great Falls Region: 1986-1987	93
2.30	The Havre Region	99
2.31	Wage and Salary Employment in the Havre Region: 1986-1987	100
2.32	The Helena Region	107
2.33	Wage and Salary Employment in the Helena Region: 1986-1987	108
2.34	The Kalispell Region	115
2.35	Wage and Salary Employment in the Kalispell Region: 1986-1987	116
2.36	The Lewistown Region	122
2.37	Wage and Salary Employment in the Lewistown Region: 1986-1987	123
2.38	The Miles City Region	130
2.39	Wage and Salary Employment in the Miles City Region: 1986-1987	131
2.40	The Missoula Region	138
2.41	Wage and Salary Employment in the Missoula Region: 1986-1987	139

LIST OF FIGURES

1.1	U.S. and Montana Employment: 1880-1920	6
1.2	U.S. and Montana Employment: 1920-1980	6
1.3	U.S. and Montana Civilian Employment: 1979-1987	7
1.4	Employment--Montana: 1969-1986	8
1.5	Population--Montana: 1969-1986	8
1.6	Montana Seasonally Adjusted Wage/Salary Jobs: (1st quarter 1979 - 2nd quarter 1988)	9

2.1	Montana Regions (map)	22
2.2	Wage/Salary Jobs as a Percent of Total Jobs in Montana: 1969-1986	24
2.3	Regional Shares of Montana Jobs: 1986 (and) 1969	27
2.4	Percent Change in Total Jobs: 1979-1986	28
2.5	Self-Employment in Montana: 1986	30
2.6	Jobs in Montana: 1969 (and) 1986	31
2.7	Unemployment Rate--Montana: 1970-1987	34
2.8	Unemployment Rates in Montana Regions: 1987	34
2.9	Employment--Montana: 1969-1986	35
2.10	Population--Montana: 1969-1986	35
2.11	Income--Montana: 1979-1987	39
2.12	Composition of Montana Personal Income: 1984-1987 Average (and) 1969-1971 Average	40
2.13	Earnings Per Job in Montana: 1979-1987	47
2.14	Employment--Billings Region: 1969-1986	51
2.15	Population--Billings Region: 1969-1986	51
2.16	Unemployment Rate--Billings Region: 1970-1987	54
2.17	Income--Billings Region: 1979-1987	55
2.18	Employment--Bozeman Region: 1969-1986	59
2.19	Population--Bozeman Region: 1969-1986	59
2.20	Unemployment Rate--Bozeman Region: 1970-1987	62
2.21	Income--Bozeman Region: 1979-1987	63
2.22	Employment--Butte Region: 1969-1986	67
2.23	Population--Butte Region: 1969-1986	67
2.24	Unemployment Rate--Butte Region: 1970-1987	70
2.25	Income--Butte Region: 1979-1987	71
2.26	Employment--Glasgow-Wolf Point Region: 1969-1986	75
2.27	Population--Glasgow-Wolf Point Region: 1969-1986	75
2.28	Unemployment Rate--Glasgow-Wolf Point Region: 1970-1987	78
2.29	Income--Glasgow-Wolf Point Region: 1979-1987	79
2.30	Employment--Glendive-Sidney Region: 1969-1986	83
2.31	Population--Glendive-Sidney Region: 1969-1986	83
2.32	Unemployment Rate--Glendive-Sidney Region: 1970-1987	86
2.33	Income--Glendive-Sidney Region: 1979-1987	87
2.34	Employment--Great Falls Region: 1969-1986	91
2.35	Population--Great Falls Region: 1969-1986	91
2.36	Unemployment Rate--Great Falls Region: 1970-1987	94
2.37	Income--Great Falls Region: 1979-1987	95
2.38	Employment--Havre Region: 1969-1986	98
2.39	Population--Havre Region: 1969-1986	98
2.40	Unemployment Rate--Havre Region: 1970-1987	101
2.41	Income--Havre Region: 1979-1987	102

2.42	Employment--Helena Region: 1969-1986	106
2.43	Population--Helena Region: 1969-1986	106
2.44	Unemployment Rate--Helena Region: 1970-1987	109
2.45	Income--Helena Region: 1979-1987	110
2.46	Employment--Kalispell Region: 1969-1986	114
2.47	Population--Kalispell Region: 1969-1986	114
2.48	Unemployment Rate--Kalispell Region: 1970-1987	117
2.49	Income--Kalispell Region: 1979-1987	118
2.50	Employment--Lewistown Region: 1969-1986	121
2.51	Population--Lewistown Region: 1969-1986	121
2.52	Unemployment Rate--Lewistown Region: 1970-1987	124
2.53	Income--Lewistown Region: 1979-1987	125
2.54	Employment--Miles City Region: 1969-1986	129
2.55	Population--Miles City Region: 1969-1986	129
2.56	Unemployment Rate--Miles City Region: 1970-1987	132
2.57	Income--Miles City Region: 1979-1987	133
2.58	Employment--Missoula Region: 1969-1986	137
2.59	Population--Missoula Region: 1969-1986	137
2.60	Unemployment Rate--Missoula Region: 1970-1987	140
2.61	Income--Missoula Region: 1979-1987	141

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PREFACE

Economic Conditions in Montana, 1988 presents an overview of the Montana economy from a statewide perspective, including a brief economic history of Montana from 1880 to the present. The report discusses changes in demographic and economic indicators, possible reasons for the changes, and the influence of the changes on the economy, and briefly describes the jobs outlook for 1989 and 1990. Also, the report details economic conditions in each of 12 regions statewide. Each region is analyzed using data on population, employment, and income. Many of the tables used in the analysis contain information specific to counties.

Economic Conditions in Montana, 1988 was prepared to provide decision makers with a review of the state's economic circumstances and to make available detailed data and analysis for those seeking a more in-depth understanding of the economic situation in Montana. The report is intended as a tool for policy formation, but is necessarily limited in scope, and should not be construed as an attempt to explain all of the many aspects of Montana's diverse and complex economy.

As with two previous reports on economic conditions in Montana, this study was sponsored by the Governor's Council on Economic Development, which was created by Executive Order No. 15-83.



Note: Regional definitions used in this report are those established by Executive Order 2-71, dated August 24, 1971, as amended by Executive Order 7-73, dated October 29, 1973. (The 1971 Executive Order placed Sanders County in the Missoula Region; the 1973 Executive Order placed Sanders County in the Kalispell Region.) The regional definitions, or multi-county districts, originated from a study done in 1970-71 by the Montana Department of Planning and Economic Development--**Report to the Governor: Proposed Multi-County Districts for the State of Montana** (November 1970)--for the purposes of service, administration, planning, and data reporting in the state.

The previous edition of this report, **Economic Conditions in Montana, 1986**, placed Sanders County in the Missoula Region.

ECONOMIC DEFINITIONS

Basic or export industries. Industries that produce goods or services mostly for sale outside the state or region or are influenced by events occurring outside the area. Montana's basic or export industries include agriculture, manufacturing (including wood products, paper, primary metals), mining, heavy construction, railroads, federal government, and nonresident travel. The labor income of persons working in basic industries represents net injection of new funds into an area, creating additional income (in the derivative industries) as those funds are spent and respent.

Derivative industries. Industries that serve the local population. These include retail and wholesale trade, most services, financial institutions, insurance and real estate agencies, transportation companies (except railroads and interstate trucking), construction (except heavy construction), public utilities, and state/local government.

Earnings. Wages, salaries, fringe benefits, net income of self-employed.

Labor income. The labor income of all persons engaged in the current production of goods and services. Does not include corporate profits. Consists mostly of wages and salaries plus the earnings of the self-employed.

Natural population increase. Births minus deaths.

Net migration of population. Net persons moving into or out of an area. Net migration is an excess of those moving in over those moving out. Net outmigration is the reverse.

Nonfarm labor income. The labor income of all persons, except those in agriculture, engaged in the current production of goods and services. Does not include corporate profits. Consists mostly of wages and salaries plus the earnings of the self-employed.

Per capita income. Total personal income from all sources divided by total population. Often used to measure and compare well-being in various areas.

Personal income. The income of residents of an area from all sources. It is measured after the deduction of personal contributions to social security but before the deduction of income and other personal taxes.

Property income. Income from interest payments, dividends on stocks, and rent.

Transfer payments. Social security benefits, certain government pensions, unemployment, compensation, and income maintenance payments such as welfare and food stamps.

^^^

CHAPTER 1

OVERVIEW OF THE MONTANA ECONOMY: HISTORY AND FORECASTS

The Montana economy, as measured by jobs, currently is growing, and jobs have been increasing since late 1986. Chapter 1 outlines employment growth for the years 1987 and 1988, the shift from wage/salary jobs to self-employment in the 1980s and the volatility in job levels. An historical perspective on employment change from 1880 to the present is given, and published forecasts for 1989 and 1990 are summarized.

The Early White Settlement Period, 1880-1920

Montana experienced substantial employment and associated population growth during the early white settlement period of 1880-1920. According to U.S. Census data, employment in 1880 was about 22,000, and by 1920 it had increased approximately 10 fold to 214,000. Total population grew from about 40,000 to around 550,000 as the result of two phenomena: more births than deaths, and more people moved into Montana than moved out resulting in net in-migration. This latter factor relates to employment growth in the state as compared with the nation, as illustrated in Figure 1.1. The remarkable employment growth in Montana resulted in net in-migration of about 310,000 people. The rest of the population growth between 1880 and 1920 (200,000) was a result of the natural increase in population (an excess of births over deaths).

The Period 1920-1980

Except for the decade of the 1970s, this 60-year period was one of slow growth in employment and population. Between 1970 and 1980 growth was moderate, with 13 percent population growth in Montana versus 11 percent nationally.

Employment remained constant between 1920 and 1940, and increased only 37 percent over the 30 year period of 1940-1970, or about 1 percent per year. U.S. employment growth between 1920 and 1970 was much stronger than for Montana (Figure 1.2). Not surprisingly, Montana experienced net out-migration (more people left the state than came) every decade between 1920 and 1970, for a total net out-migration of about 220,000 people. Excluding the 1920s, total population generally did not decline over this period, however, because of the natural increase in population.

The years 1970-1980 represent an oddity in Montana's recent economic history. The decade of the 1970s was the first since 1910-1920 where Montana experienced somewhat higher employment growth than the nation as a whole (34 percent versus 28 percent). And the decade also produced the first net in-migration (33,000) since World War I.

The Period 1980-1990

Employment and population growth in the 1980s has been erratic, and a structural shift from wage/salary jobs to self-employment has occurred. As illustrated by Figure 1.3, the growth in the number of employed persons in Montana between 1979 and 1987 was less than the national average because of a net out-migration of about 29,000 people between 1980 and 1987, most of which occurred after 1984. Total population increased between 1980 and 1985, but has decreased since 1985 because the level of net out-migration has been higher than the excess of births over deaths. Total population was estimated at about 805,000 for 1988 compared with 787,000 in 1980. (Figure 1.5 shows population trends for 1969-1986.)

Structural Change 1979-1987

The U.S. Bureau of Economic Analysis shows that between 1979-87, total jobs in Montana increased by about 14,000. There was a net loss of approximately 11,000 wage/salary jobs, while the number of self-employed increased by roughly 25,000 (all in the non-agricultural sector), representing a substantial employment composition shift. Neighboring states of Idaho and Wyoming also experienced this same shift, as did North Dakota and South Dakota to a lesser degree. Montana's rate of self-employment growth, however, was higher than the average for its contiguous states.

There also was a shift among sectors in Montana within the wage/salary job category. Average earnings (wages/salaries, fringe benefits, net income of the self-employed) per job also changed over the period 1979-87, with 1979 yielding about \$12,000, and increasing to approximately \$16,000 in 1987--a gain of 33 percent. This increase, however, was less than the national rate of inflation over the 1979-87 period (52 percent). Average wages and salaries were \$11,500 in 1979, and grew to about \$16,100 in 1987 (40 percent), but were still less than the rate of inflation. Average net income of the nonfarm self-employed decreased from about \$12,700 to approximately \$11,500 over the same period, partly because of an increase in part-time, self-employed jobs. Average earnings of farm operators fluctuated widely because farm/ranch total net income varied substantially.

Major self-employed job gains occurred in assorted consumer services (such as recreation, repair, and health services)--8,000 jobs; various business services (management consultants, building maintenance, data processing services, and equipment rental)--6,000 jobs; real estate activities (operators/lessors, brokers, and agents)--4,000 jobs; and special trade construction contractors (plumbing/heating, electrical, etc.)--2,000 jobs.

Wage/salary job losses occurred primarily in construction (principally building construction)--7,000 jobs; manufacturing--about 6,000 (wood products--2,600, primary metals processing--2,100, food products--1,400); railroads--4,000; wholesale trade--2,500; federal employment (divided equally between civilian and military jobs)--1,600; communications--1,500; oil and gas extraction--1,400; and membership organizations (includes tribal governments)--1,300.

On the other hand, wage/salary employment increased in other segments of the Montana economy. The largest increase occurred in the private services sector, with a job increase of about 9,000 over the 1979-87 period. Most of the increase was concentrated in health services (5,500 jobs), and in various business services (3,000). Wage/salary jobs in eating/drinking places also increased (2,000).

Total jobs in the agricultural sector declined by about 2,000 jobs (divided equally between wage/salary jobs and self-employed) over the same period. Income earned by agricultural workers (including the self-employed) fluctuated considerably, averaging about \$250 million over the 9-year period. The lowest income years were 1984 and 1985--\$70 million and \$3 million respectively--while 1986 and 1987 (relatively good income years) posted about \$400 million each year.

Volatility of Job Levels in the 1980s

Job levels fluctuated during the 1980s for a number of reasons. Montana suffered from the seven-month national recession in 1980 as well as the five-month recession in 1981 and the recession of 1982. Slower national economic growth in 1985 and 1986 also had some effect.

The volatile effect on jobs at the industry level can be tracked in the oil/gas extraction industry, which is impacted by fluctuating world oil prices. During the 1980s, the Montana industry experienced wide swings in oil/gas jobs with an historical peak in 1981, a 20 percent decline between 1981 and 1982, and a 40 percent decrease from 1984 to 1986 when total employment in most other states was growing. Montana and other states with significant oil/gas extraction sectors declined over this latter time period.

In Montana's case, two additional factors contributed to the 1985 and 1986 decline. One was a statewide drought in 1985, with some areas of Montana suffering dry conditions in the immediate previous years. As a result, Montana's farmers and ranchers experienced net negative income from 1983-1985, reaching an overall loss level of about \$100 million in 1985. Second was job losses associated with several manufacturing plant closures in 1985 and 1986, along with employment declines in other manufacturing industries because new machinery was substituted for labor to compete in national and world markets.

Job Recovery, 1987-1988

Figure 1.4 illustrates the volatility of wage/salary jobs covered by the unemployment insurance program in the 1980s. The graph also shows that wage/salary jobs started to increase at the end of 1986 and continued to rise through the second quarter of 1988 (the last quarter for which data from this series is available). Currently available sample data for the rest of 1988 indicates that the recovery continued.

Timing of Recovery by Major Industry Group

Jobs growth in the private services sector was most notable in leading the overall economic recovery. Employment in this sector essentially increased throughout the 1980s, while jobs in other segments of the Montana economy fluctuated. Retail trade also led the recovery, preceding the general increase by six months, and federal government jobs preceded the overall recovery by several months.

Several broad sectors lagged in their recovery as compared with the Montana economy as a whole. Mining's recovery began in the spring of 1987, partly because oil/gas exploration jobs decline ended, and partly because metal mining jobs increased. The manufacturing sector began its recovery about September 1987, as did construction, although it apparently stalled in 1988. Finally, the combined transportation/utilities industry grew starting in January 1988, because the transportation component increased.

Several segments of Montana's economy also have declined over the same time period. Wholesale trade has declined since the summer of 1981, partly because of the state of oil/gas exploration. Wholesale trade decline in 1987-1988 was less severe than in previous years. State government jobs have declined since the end of 1985, with only a small increase in 1988 related to the hiring of temporary fire fighters. Local government jobs have declined since mid-1986.

Job Changes in Specific Industries, 1986-1988

Table 1.1 shows the changes in wage/salary jobs over the recovery period for specific industries in the non-agricultural portion of the Montana economy. It should be noted that the data in the table understate the recovery for 1987. This understatement results because wage/salary employment declined over 1986 and recovered by the end of 1987 to a level only somewhat higher than that of the beginning of 1986 (as shown in Figure 1.6). Thus, the 12-month average for 1986 and 1987 indicates only a modest increase for 1987 even though growth was sustained once it started at the end of 1986. To partially deal with this technical data problem, the following discussion emphasizes a comparison of 1986 with 1988.

The private services sector experienced the largest job growth between 1986 and 1988, with an increase of 4,800 wage/salary jobs, continuing the growth pattern of earlier in the 1980s. Growth within the services category was primarily in the health and related social services category, various business services, and travel/recreation services including lodging places. Growth also occurred in other travel-related sectors. Eating/drinking places increased by about 700 jobs. Air transportation (included in the "other transportation" category of Table 1.1) also showed a large percentage increase in jobs (roughly 15 percent to 20 percent).

The metal mining industry increased by about 1,000 jobs between 1986 and 1988 largely because a number of new gold mines and one platinum/palladium mine in

Stillwater County opened. The largest new gold mine is the Montana Tunnels project located in Jefferson County. The reopening of the Butte copper mine in mid-1986 also contributed to the growth in metal mining between 1986 and 1988.

The broadly defined declining sectors in 1986-1988 were construction, transportation and public utilities, state/local government, and wholesale trade. With the exception of state and local government, all these industries also experienced declines earlier in the 1980s. All construction categories shared in the decline. The decreases appear to have stopped in 1988, however, as shown in Table 1.1. Railroad transportation and the communications industry were primarily responsible for the decrease in the transportation and utilities sector. Both state and local government jobs decreased over the 1986-1988 period. Most of the decline within wholesale trade was in the durable goods segment, which includes oil field machinery and farm equipment.

Outlook for Jobs in 1989

The Bureau of Business and Economic Research (University of Montana), the Federal Reserve Bank of Minneapolis, and the First Interstate Bank forecast continued growth in nonfarm wage/salary jobs. Forecasts range from no growth to a one percent increase. Estimates, however, may be conservative because they were made prior to a recent upward revision of the historical jobs estimates.

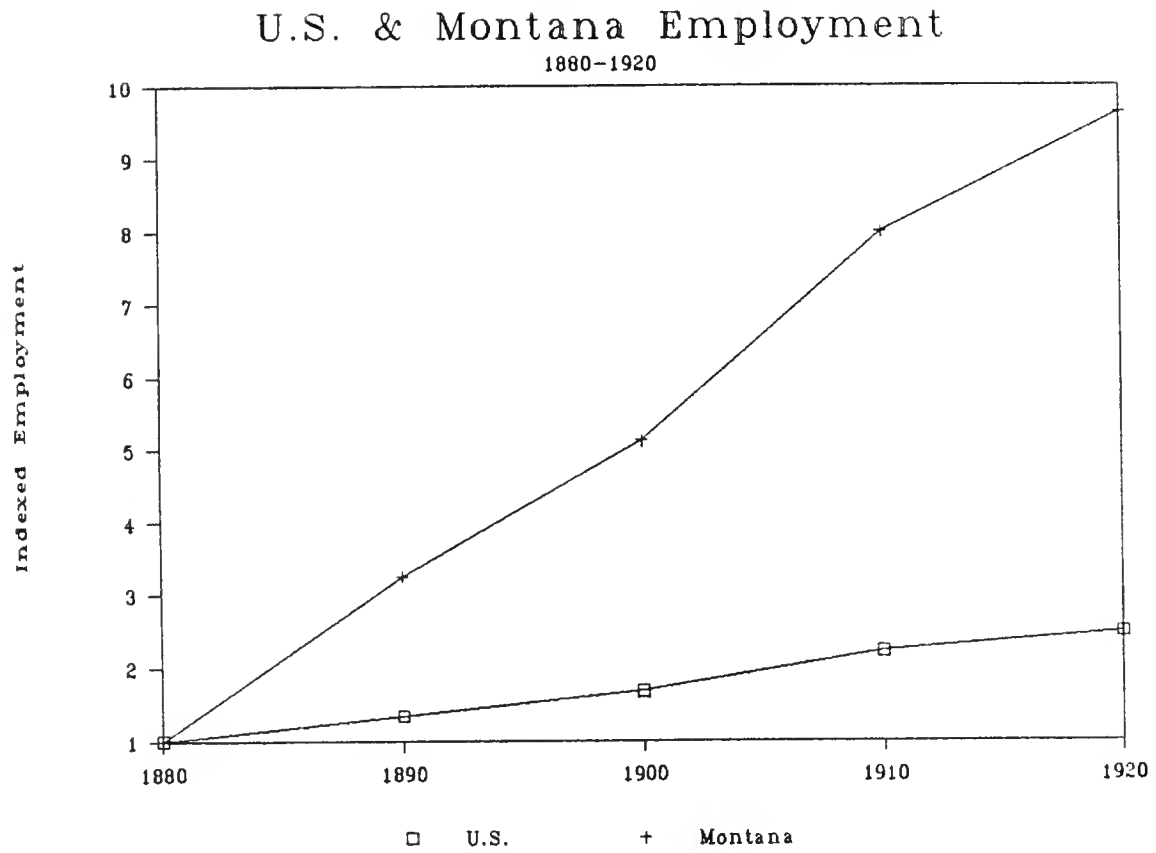
The Bureau of Business and Economic Research projects one percent total jobs growth, or an increase of about 3,000 jobs for 1989. More than half the increase is expected in private services, and other increases are foreseen in forest products and metal mining. No increase is forecasted for government.

Outlook for Jobs in 1990

The forecasted increase in nonfarm wage/salary jobs for 1990 ranges from no increase to an 0.8 percent increase. Most of the increase is projected for private services, and a small decrease is forecasted for wood/paper products.

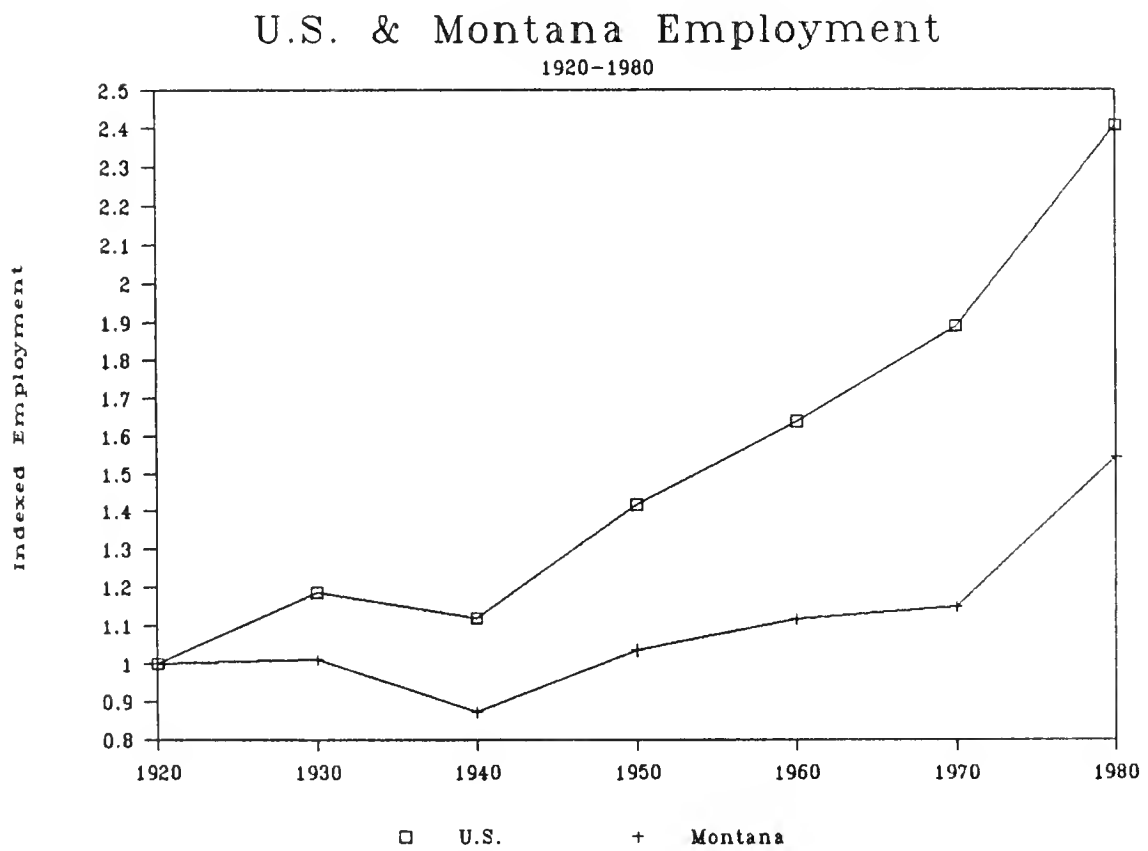
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Figure 1.1



Source: U.S. Bureau of the Census.

Figure 1.2

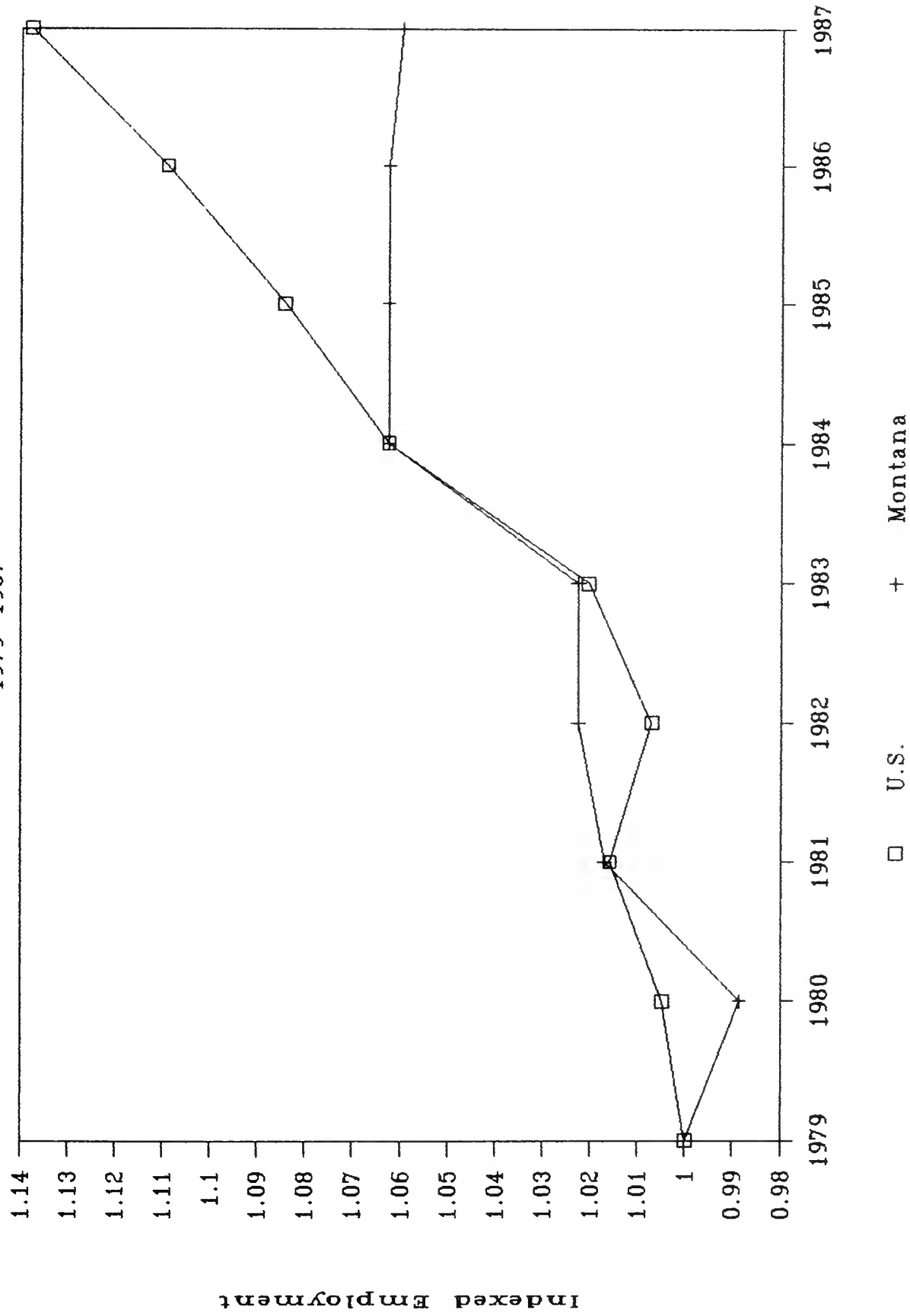


Source: U.S. Bureau of the Census.

Figure 1.3

U.S. & Montana Civilian Employment

1979-1987



Sources: U.S. Department of Labor, and Montana Department of Labor and Industry.

Figure 1.4

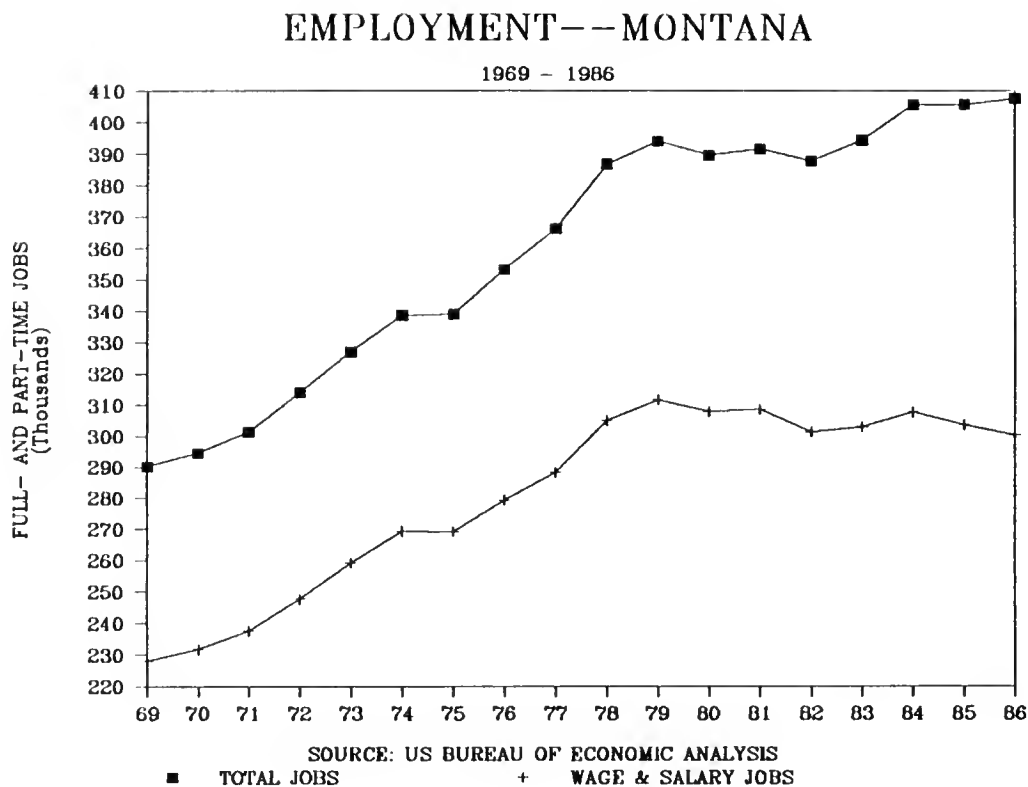


Figure 1.5

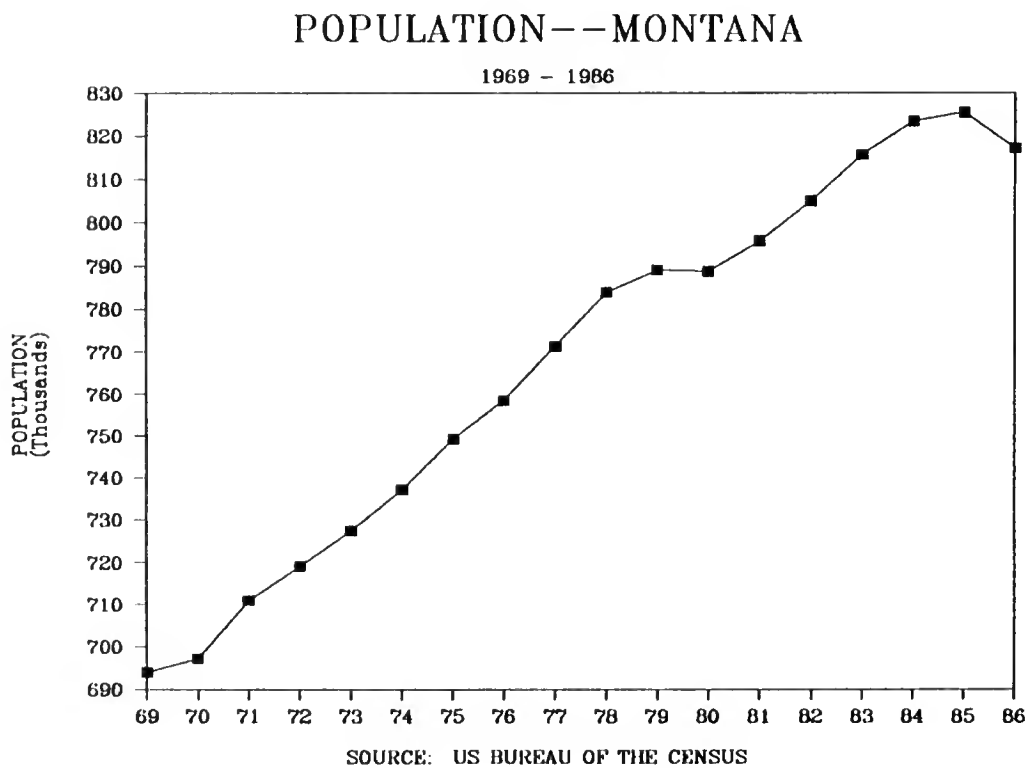
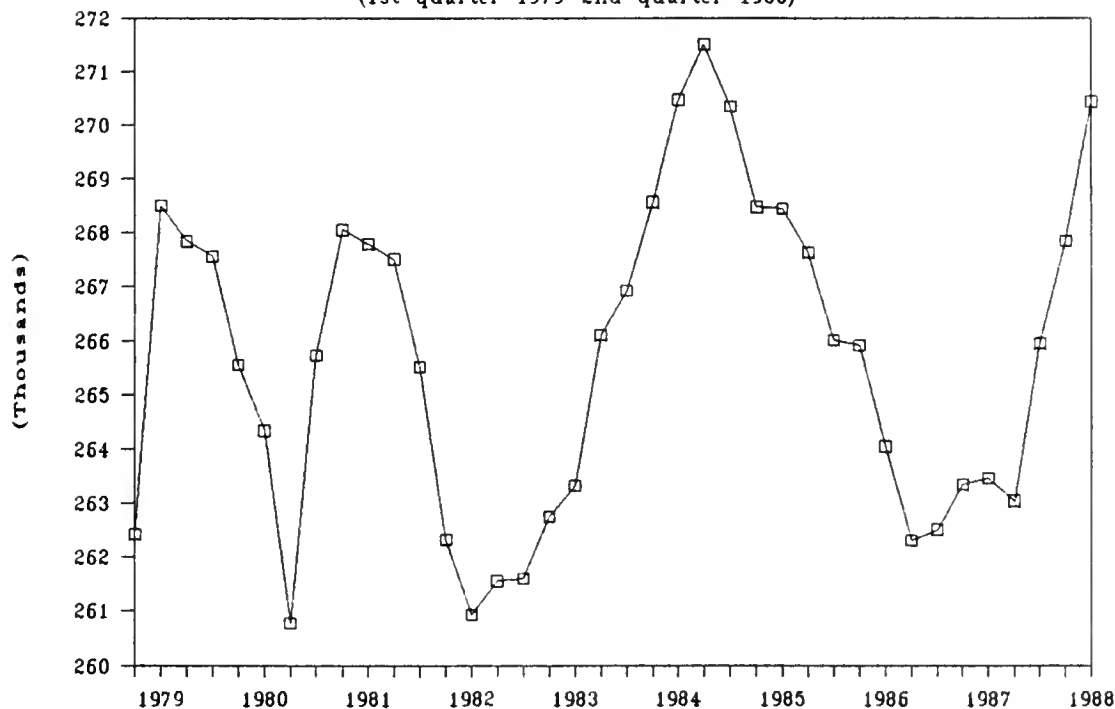


Figure 1.6

Montana Seasonally Adj Wage/Salary Jobs

(1st quarter 1979-2nd quarter 1988)



Source: Research and Analysis Bureau, Montana Department of Labor and Industry, unpublished data.

Table 1.1

MONTANA NON-AGRICULTURAL WAGE AND SALARY JOBS, 1986-1988 (Thousands of Jobs)

	1986	1987	1988 Prel.	1987-1988 Change	1987-1988 % Change
TOTAL NON-AGRICULTURAL JOBS	275.4	276.0	279.6	3.6	1.3%
MINING	5.8	5.7	6.3	0.6	10.5%
Metal Mining	1.2	1.7	2.2	0.5	29.4%
Oil and Gas Extraction	2.3	2.0	2.0	0.0	0.0%
Coal and Other Non-Metals	2.3	2.0	2.1	0.1	5.0%
CONSTRUCTION	10.2	8.7	8.7	0.0	0.0%
General Building Contractors	2.8	2.4	2.4	0.0	0.0%
Heavy Construction Contractors	2.9	2.3	2.3	0.0	0.0%
Special Trade Contractors	4.5	4.0	4.0	0.0	0.0%
MANUFACTURING	21.1	21.0	21.3	0.3	1.4%
DURABLE GOODS	12.8	12.9	13.1	0.2	1.6%
Lumber and Wood Products	8.2	8.4	8.1	-0.3	-3.6%
Primary Metals Processing	1.2	1.2	1.2	0.0	0.0%
Other Durable Goods	3.3	3.3	3.8	0.5	15.2%
NON-DURABLE GOODS	8.4	8.1	8.2	0.1	1.2%
Food and Kindred Products	2.8	2.7	2.7	0.0	0.0%
Printing and Publishing	2.4	2.4	2.5	0.1	4.2%
Petroleum Refining	0.9	0.8	0.8	0.0	0.0%
Other Non-Durable Goods	2.3	2.2	2.2	0.0	0.0%
TRANSPORTATION AND UTILITIES	20.4	19.6	19.4	-0.2	-1.0%
Railroads	3.7	3.4	3.3	-0.1	-2.9%
Other Transportation	8.1	8.0	8.2	0.2	2.5%
Utilities	8.5	8.2	7.9	-0.3	-3.7%
WHOLESALE TRADE	15.4	14.8	14.7	-0.1	-0.7%
RETAIL TRADE	57.2	57.9	58.9	1.0	1.7%
General Merchandise and Apparel	8.3	8.6	8.6	0.0	0.0%
Food Stores	8.5	8.5	8.8	0.3	3.5%
Auto, Dealers and Service Stations	7.8	7.8	7.9	0.1	1.3%
Eating and Drinking Places	21.7	22.0	22.4	0.4	1.8%
Other Retail Trade	11.0	11.1	11.2	0.1	0.9%
FINANCE, INSURANCE, AND REAL ESTATE	13.1	13.3	13.3	0.0	0.0%
PRIVATE SERVICES	62.1	65.0	66.9	1.9	2.9%
Hotels and Other Lodging Places	6.9	6.9	7.1	0.2	2.9%
Personal Services	3.0	2.9	3.0	0.1	3.4%
Health Services	21.9	23.1	23.4	0.3	1.3%
Other Services	30.4	32.0	33.4	1.4	4.4%
GOVERNMENT	70.2	70.0	70.1	0.1	0.1%
Federal-Civilian	12.7	13.2	13.5	0.3	2.3%
State Government	19.4	19.0	19.1	0.1	0.5%
Colleges and Universities	8.8	8.6	8.6	0.0	0.0%
Other State Government	10.6	10.3	10.5	0.2	1.9%
Local Government	38.0	37.8	37.5	-0.3	-0.8%
Local Education	22.8	22.8	22.6	-0.2	-0.9%
Other Local Government	15.2	15.0	14.9	-0.1	-0.7%

Sources: Research and Analysis Bureau, Montana Department of Labor and Industry for 1986 and 1987 data; Office of Research and Information Services, Montana Department of Commerce for 1988 data, based in part on published and unpublished information supplied by the Montana Department of Labor and Industry.

Table 1.2

WAGE & SALARY EMPLOYMENT IN MONTANA*: 1986-1987

INDUSTRY	SIC** CODE	1986	1987	CHANGE	PERCENT CHANGE
Total Wage and Salary Employment		263,662	264,285	623	0.2%
Total Private		201,933	202,846	913	0.5%
Agriculture, Forestry, Fishing, Hunting, & Trapping		E 2,910	E 2,968	E 58	E 2.0%
Agricultural Production--Crops **	01	592	585	(7)	-1.2%
Agricultural Production--Livestock ***	02	1,200	1,205	5	0.4%
Agricultural Services	07	896	973	77	8.6%
Forestry	08	222	205	(17)	-7.7%
Fishing, Hunting, and Trapping	09	"0"	"0"	"0"	"0"
Mining		5,800	5,767	(33)	-0.6%
Metal Mining	10	1,202	1,709	507	42.2%
Coal Mining	12	1,300	1,130	(170)	-13.1%
Oil and Gas Extraction	13	2,275	2,008	(267)	-11.7%
Mining of Non-Metallic Minerals, Except Fuels	14	1,022	919	(103)	-10.1%
Construction		10,218	8,690	(1,528)	-15.0%
General Building Contractors	15	2,806	2,391	(415)	-14.8%
Heavy Construction Contractors	16	2,939	2,304	(635)	-21.6%
Special Trade Contractors	17	4,472	3,994	(478)	-10.7%
Manufacturing		E 21,149	E 20,911	E (238)	E -1.1%
Food and Kindred Products	20	2,785	2,716	(69)	-2.5%
Textile Mill Products	22	"0"	"0"	"0"	"0"
Apparel and Other Textile Products	23	593	537	(56)	-9.4%
Lumber and Wood Products	24	8,235	8,358	123	1.5%
Furniture and Fixtures	25	227	216	(11)	-4.8%
Paper and Allied Products	26	857	845	(12)	-1.4%
Printing and Publishing	27	2,418	2,415	(3)	-0.1%
Chemicals and Allied Products	28	656	598	(58)	-8.8%
Petroleum Refining and Related Industries	29	861	773	(88)	-10.2%
Rubber and Miscellaneous Plastic Products	30	132	178	46	34.8%
Leather and Leather Products	31	71	48	(23)	-32.4%
Stone, Clay, Glass, and Concrete Products	32	1,042	893	(149)	-14.3%
Primary Metals Processing	33	1,210	1,177	(33)	-2.7%
Fabricated Metal Products	34	571	542	(29)	-5.1%
Machinery, Except Electrical	35	481	538	57	11.9%
Electrical and Electronic Equipment	36	165	164	(1)	-0.6%
Transportation Equipment	37	197	188	(9)	-4.6%
Instruments and Related Products	38	131	148	17	13.0%
Miscellaneous Manufacturing Industries	39	517	577	60	11.6%
Transportation and Public Utilities		16,746	16,143	(603)	-3.6%
Local and Interurban Passenger Transit	41	1,132	1,040	(92)	-8.1%
Trucking and Warehousing	42	5,568	5,314	(254)	-4.6%
Water Transportation	44	18	16	(2)	-11.1%
Transportation by Air	45	853	995	142	16.6%
Pipelines, Except Natural Gas	46	97	77	(20)	-20.6%
Transportation Services	47	507	525	18	3.6%
Communications	48	3,942	3,590	(352)	-8.9%
Electric, Gas, and Sanitary Services	49	4,625	4,582	(43)	-0.9%
Wholesale Trade		15,294	15,002	(292)	-1.9%
Durable Goods	50	8,079	7,879	(200)	-2.5%
Nondurable Goods	51	7,214	7,122	(92)	-1.3%
Retail Trade		57,241	57,770	529	0.9%
Building Materials and Hardware	52	2,758	2,667	(91)	-3.3%
General Merchandise Stores	53	5,752	6,154	402	7.0%
Food Stores	54	8,509	8,508	(1)	-0.0%
Automotive Dealers and Service Stations	55	7,730	7,754	24	0.3%
Apparel and Accessory Stores	56	2,500	2,444	(56)	-2.2%
Furniture and Home Furnishings Stores	57	2,156	2,163	7	0.3%
Eating and Drinking Places	58	21,803	21,944	141	0.6%
Miscellaneous Retail	59	6,030	6,134	104	1.7%
Finance, Insurance, and Real Estate		13,073	13,163	90	0.7%
Banking	60	4,987	4,808	(179)	-3.6%
Credit Agencies other than Banks	61	1,834	1,861	27	1.5%
Security, Commodity Brokers, and Services	62	577	604	27	4.7%
Insurance Carriers	63	1,262	1,335	73	5.8%
Insurance Agents, Brokers, and Services	64	1,754	1,726	(28)	-1.6%
Real Estate	65	2,420	2,536	116	4.8%
Combined Real Estate, Insurance, Etc.	66	96	96	0	0.0%
Holding and Other Investment Offices	67	141	193	52	36.9%
Services		59,406	62,363	2,957	5.0%
Hotels and Other Lodging Places	70	6,881	6,952	71	1.0%
Personal Services	72	2,951	2,908	(43)	-1.5%
Business Services	73	6,297	6,815	518	8.2%
Auto Repair, Services, and Garages	75	2,024	1,984	(40)	-2.0%
Miscellaneous Repair Services	76	855	956	101	11.8%
Motion Pictures	78	600	558	(42)	-7.0%
Amusement and Recreation Services	79	2,348	2,547	199	8.5%
Private Health Services	80	21,883	23,457	1,574	7.2%
Legal Services	81	1,950	2,088	138	7.1%
Private Educational Services	82	1,808	1,870	62	3.4%
Private Social Services	83	4,334	4,740	406	9.4%
Museums, Art Galleries, Etc.	84	93	104	11	11.8%
Membership Organizations Including Tribal Gov't	86	4,204	4,109	(95)	-2.3%
Private Households	88	327	355	28	8.6%
Engineering, Accounting, and Other Services	89	2,843	2,914	71	2.5%
Non-Classifiable	99	71	37	(34)	-47.9%
Government		61,729	61,439	(290)	-0.5%
State		15,589	15,306	(283)	-1.8%
Local		33,469	33,008	(461)	-1.4%
Federal		12,670	13,124	454	3.6%

*Includes only employment covered by the Unemployment Insurance Program.

**Standard Industrial Classification

***These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

CHAPTER 2

ECONOMIC AND DEMOGRAPHIC CONDITIONS THROUGHOUT MONTANA

Chapter 2 details Montana's economic and demographic conditions by considering the state as a whole and as an amalgamation of 12 different economic regions. The regions, shown in Figure 2.1, are composed of three to six counties that to some extent share common economic, geographic, and demographic characteristics. An extensive analysis of employment, population, and income is provided for Montana and each of the 12 regions, including an historical perspective and recent trends.

Throughout the chapter, several standards are maintained. All dollar figures are inflated to constant 1987 dollars to remove any inflation-caused distortions. Also, income and employment data from the U.S. Bureau of Economic Analysis are taken from the latest available county series (April 1988), while statewide numbers used in Chapter 1 are from a revised series (August 1988). Total county jobs data for 1987 were unavailable by two digit industry code when this chapter was written, but wage/salary jobs data are used. Finally, whenever rankings are listed for regions (1-12) or counties (1-56), the rank of "first" corresponds to "best." Thus, the region with the highest total personal income ranks first, as does the region with the lowest unemployment rate.

STATEWIDE OVERVIEW

The following overview of the Montana economy discusses changes in demographic and economic indicators, possible reasons for the changes, and the influence of the changes on the economy. The 12 regions are compared and contrasted; regional detail is presented later. As with the sections devoted to each individual region, this section is divided into three major parts: labor force, population, and income.

LABOR FORCE

Jobs and Job Growth

In 1986, Montanans held about 400,000 jobs, representing the peak of general job growth since 1969 (Table 2.1 and Figure 1.4). However, several exceptions to the job growth trend exist. First, the national recession of 1975 resulted in a decline in jobs in many regions throughout the state, causing the total number of jobs in Montana to remain approximately constant for that year. Second, a strong recession occurred in most regions in 1980, producing a general decline in both total jobs and wage/salary jobs through 1982.

Finally, although the total number of jobs in Montana has increased since 1983, wage/salary jobs declined in 1985 and 1986 (Table 2.2) before increasing once again in 1987 (Table 2.3). The general exception to this phenomenon was the energy-rich eastern third of Montana. Jobs for this area peaked around 1981 (primarily because of the peak in the world price of crude oil) and have declined since that time.

No region dominates the Montana economy, although the Billings Region and the Great Falls Region, (the state's two largest employing regions) together account for more than 30 percent of the state's total jobs. Diversity in both jobs distribution and growth is a basic characteristic of Montana, as shown in Figures 2.3 and 2.4. The Great Falls Region was the state's largest employer in 1969, but from 1969 to 1986 its share of jobs has declined. During the same time, the Billings Region grew to hold the leading position for total jobs.

Table 2.4 displays the growth rates of total jobs for Montana and its regions. The annual average growth rate for Montana between 1969 and 1986 was 2.4 percent, equalling the average growth rate for the nation. Growth since 1979, however, was much slower in the state than in the nation; Montana's jobs grew at an average rate of 0.5 percent per year for a total increase of 3.4 percent, while jobs in the nation increased by 1.9 percent per year for a total increase of 13 percent.

Comparing Table 2.4 with Figures 2.3 and 2.4 verifies that regions growing faster than the statewide average increased their total job share in the state. These regions (in descending order of annual growth rates) were Bozeman, Helena, Missoula, Billings, and Kalispell. Regions that experienced a declining share of total jobs between 1969 and 1986 were Miles City, Havre, Great Falls, Glendive-Sidney, Lewistown, Glasgow-Wolf Point, and Butte. Table 2.1 shows the number of jobs in Montana's regions between 1979 and 1986. The jobs decline in the Lewistown, Glasgow-Wolf Point, Great Falls, Butte, Glendive-Sidney, and Havre regions is particularly noticeable (Figure 2.4). Jobs in the other regions increased, and the rate of increase was below the statewide average only in the Miles City Region. Exact percentages may be found in Table 2.4.

Table 2.3 shows growth in wage/salary jobs at the state, region, and county level between 1986 and 1987. The small increase of 623 jobs, however, understates the recovery in 1987 because the numbers are yearly averages (specifically, declines during 1986 tend to "average out" 1987 growth). Between the fourth quarter of 1986 and the fourth quarter of 1987, wage/salary jobs actually increased by nearly 3,600 jobs or 1.4 percent.

The regional recovery distribution, at least in its initial stages, is uneven. Table 2.3 reveals that only four of the 12 regions experienced a significant increase in wage/salary jobs: Kalispell, Helena, Missoula, and Butte. Declines continued in all of the other regions except the Great Falls Region, which increased by 0.2 percent, the same as the state's rate.

Self-Employment

One of the most outstanding features of Montana's labor force is the vigorous self-employment growth that has occurred, especially since 1979. Historically, self-employment in the state has accounted for a larger share of total jobs than the national average, mainly because of the importance of agriculture to the state economy. For instance, in 1969, self-employment in Montana represented 21 percent of all jobs, compared to 12 percent nationally. Strong self-employment growth boosted these statistics to 26 percent and 15 percent in 1986 for the state and the nation respectively. But as Table 2.5 shows, nearly all of the state's increase has occurred since 1979 with the decline of the percentage of total jobs held by wage/salary employees. In addition, self-employment in agriculture has declined since 1969. Therefore, the growth was in nonfarm self-employment.

In 1986, more than 107,000 jobs were held by the self-employed, accounting for 26 percent of all jobs in the state. Figure 2.5 shows that most of the self-employed held jobs in services and agriculture, which together accounted for 56 percent of the state's self-employment. Finance/insurance/real estate, along with retail trade, accounted for another 25 percent, while 10 percent of the self-employment was in construction. Transportation and public utilities made up 4 percent, and manufacturing, mining, and wholesale trade together constituted the remaining 4 percent.

The importance of the self-employed to the Montana economy is evident in Figure 2.2 and Table 2.5. As Figure 2.2 indicates, between 1984 and 1986, wage/salary jobs decreased. During this same period, however, total jobs increased slightly because of the steady growth of self-employment. Table 2.5 recounts this growth between 1979 and 1986. Several of Montana's regions posted enormous increases in self-employment, led by an increase of nearly 55 percent in the Helena Region.

Although the reasons for dramatic growth in self-employment are not entirely clear, several factors are apparent. First, the growth represents, in part, a change in work force preference. In recent years, the entrepreneurial challenge appears to have piqued the minds of more individuals. Second, with wage/salary jobs declining, those who wish to continue to live in Montana often must find an alternative source of employment. Finally, the data may overstate the growth in self-employed jobs to some extent.

Growth by Economic Sector

Figure 2.6 portrays the sectoral breakdown of Montana's jobs for 1986 and 1969. As is evident from the first pie chart, services, government, and retail trade were the major employers in 1986, accounting for more than 60 percent of all jobs in the state. In addition, agriculture, finance, insurance, and real estate, transportation/public utilities, manufacturing, and construction each contributed significant shares, while wholesale trade and mining each accounted for less than 5 percent of the state's total jobs.

Sectoral jobs distribution generally reflects the national jobs distribution.

A few key differences, however, are present. First, manufacturing is much more important in the national economy, representing 15.4 percent of all jobs, versus only 5.8 percent in Montana. Government and agriculture appear to make up for this difference, accounting for 18.2 percent and 9.3 percent of Montana's jobs, respectively, as compared with only 15.5 percent and 3.6 percent of the nation's jobs. A higher share of employment applied to government jobs, however, is typical for rural, sparsely populated states across the nation.

Comparing the two pie charts provides insight into another important change in Montana's economy: the decline of traditional goods-producing sectors and the growth of service-oriented sectors. With the exception of construction, all goods-producing sectors experienced a decline in the share of total jobs between 1969 and 1986, with the largest decline occurring in agriculture. In contrast, shares of the service-oriented sectors increased (except for government, transportation/public utilities), with the private service sector rising from 17.6 percent to 25 percent of total jobs. These general changes reflect a nationwide shift toward the service industries.

The remainder of this section details the changes in each major economic sector since 1969.

Agriculture (including forestry), historically a key industry in Montana, accounted for 9.3 percent of total jobs in 1986, down from 13.8 percent in 1969. Production agriculture, the overwhelmingly dominant industry in this sector, experienced a large decrease in jobs between 1969 and 1986, contributing to the decline of the entire sector. Actual crop and livestock production grew, however, because of increased productivity through the use of better technology, for example. Jobs in agricultural services (such as farm management and contract labor, crop dusting and spraying, packing and shipping of fruits and vegetables) experienced job growth, as did forestry. Logging and other processing operations are discussed with manufacturing.

Mining represented 1.8 percent of total jobs in 1986 at the state level, (down from 2.4 percent in 1969) compared with a figure of 0.9 percent at the national level. The 1970s saw strong growth in the mining industry, with wage/salary jobs increasing by 22 percent, mainly because of extensive growth in coal mining and oil/gas extraction. Large reductions in metal mining employment, however, (mainly in the Butte Region) took place, and partially offset the growth of the other two industries. As a sector, mining continued to grow into the 1980s, peaking in 1981. Between 1981 and 1986, much of this growth reversed, with both oil/gas extraction and metal mining suffering large job losses while employment in the coal mining industry remained steady until 1987.

The non-metallic minerals sector (excluding fuels) grew during this period, primarily because of increased talc production. In terms of net growth between 1969 and 1986, wage/salary jobs in coal mining grew by 1,200, mining of non-energy non-metals by 300, oil/gas extraction remained relatively unchanged, and metal mining lost 2,200 wage/salary jobs (66 percent). Consequently, the industry as a whole declined by 9 percent, or more than 500

wage/salary jobs. Because of offsetting growth in self-employment, however, total jobs actually increased slightly between 1969 and 1986. In 1987, wage/salary jobs continued to decline in this sector, despite the strong recovery of metal mining. Coal mining, oil/gas extraction, and other non-metallic mineral mining all posted large declines (Table 2.6).

Construction accounted for 5.3 percent of the state's total jobs in 1986, equal to the nationwide average share and up slightly from a 1969 level of 5 percent. Between 1969 and 1978 total jobs in this sector increased by 73 percent, peaking in 1978. This increase resulted from growth in general building construction and special trade construction (such as electrical work, carpentry, and concrete work). At the same time, heavy construction declined substantially in wage/salary employment. Total jobs grew slightly, however, because of increases in self-employment. Between 1978 and 1986, wage/salary jobs declined in all construction sectors, and the only industry to post even a slight increase in total jobs was special trade construction. Over the entire period, and despite a 31 percent decline in total jobs in heavy construction, the construction industry grew by over 7,000 jobs, or 48 percent. Much of this growth was created by increases in self-employment. In 1987, wage/salary employment declined 15 percent (Table 2.6). It is important to note, however, that in 1986, self-employment accounted for approximately one-half of the total number of jobs in this sector. Thus, part of this wage/salary job loss could reflect a shift from wage/salary construction jobs to self-employment.

Manufacturing accounted for 5.8 percent of total jobs in Montana in 1986, compared with 15.4 percent for the nation and down from 8.8 percent in 1969 (for a decline of more than one-third). A similar decline in manufacturing's share of total jobs was experienced nationally. Historically, this sector was dominated by three major industries in Montana: lumber/wood products, food/kindred products, and primary metals processing. Recently, printing/publishing and stone/concrete products also accounted for significant employment in this sector.

Although the 1970s witnessed strong growth in lumber/wood products, growth for manufacturing as a whole was less impressive, mainly because of declines in primary metal processing. Employment declines also were widespread in the 1980s, with the exception of slight growth in the apparel, paper, and furniture industries.

In terms of net growth from 1969 to 1986, lumber/wood products lost nearly 700 wage/salary jobs (8 percent), food/kindred products lost over 1,500 wage/salary jobs (36 percent), and primary metals processing lost nearly 3,400 jobs (74 percent). Overall, wage/salary jobs in manufacturing fell by almost 3,000 jobs, for a loss of 12 percent. An increase of more than 1,000 self-employment jobs only partially compensated for this loss. A similar but smaller decline was experienced at the national level, but because of increases in employee productivity, production actually increased in many manufacturing industries throughout the state and the nation, particularly the lumber/wood products industry in Montana. Table 2.6 presents the performance of manufacturing in 1987, when wage/salary jobs again declined. However,

wage/salary employment in lumber/wood products actually grew during 1987, and declines in the other major industries were fairly small, with the exception of stone and concrete products.

Transportation/public utilities accounted for 6.2 percent of the total number of jobs in Montana in 1986, versus 4.7 percent of jobs nationwide and down from 6.5 percent in 1969. All major industries experienced significant growth throughout the 1970s. During the 1980s, however, much of this growth was reversed. Between 1969 and 1986, railroad transportation declined by 2,400 wage/salary jobs (38 percent). But at the same time, trucking/warehousing, electric/gas/sanitation, and communications all experienced large increases. As a whole, the sector grew by over 3,500 wage/salary jobs (21 percent) between 1969 and 1986, although the sector lost about 2,700 jobs during the 1980s. An increase of 1,700 self-employed jobs did not fully compensate for this decrease. Another decline in wage/salary jobs in the sector, with communications and trucking/warehousing posting the largest losses, occurred in 1987 (Table 2.6).

Wholesale trade accounted for 4 percent of total jobs in 1986, less than the national average of 4.9 percent, but up from 3.6 percent in 1969. Performance during the 1970s and early 1980s was exceptionally strong, with the sector gaining nearly 9,000 jobs (83 percent) between 1969 and 1981. After a peak in 1981, total jobs in wholesale trade declined by about 3,000 jobs by 1986. In 1987, declines continued, as shown in Table 2.6. Recent performance of this sector is related to declines in oil/gas extraction since 1981, partly because of financial stress in the agricultural sector, and partly because of slow population growth in the 1980s.

Retail trade accounted for 17.6 percent of the total number of jobs in the state in 1986, slightly above the nationwide figure of 16.4 percent and up from 16.9 percent in 1969. Between 1969 and 1979, all portions of the retail trade sector experienced strong growth, especially eating/drinking places. Much of this growth continued through 1984. By the 1984-1986 period, however, many industries were experiencing a slight decline, including eating/drinking places and building materials/hardware. The retail trade sector also declined by about 1,600 jobs, or 2 percent. As a whole, however, the 1969-1986 period was one of strong growth, with total jobs increasing by nearly 23,000 (over 12,000 of this increase was in eating/drinking places), for a change of 47 percent. Growth returned once again in 1987, as shown in Table 2.6, and the sector increased by about 500 wage/salary jobs. General merchandise stores contributed most of the increase, along with eating/drinking places. Declines came in building materials/hardware and apparel/accessory stores.

Finance/insurance/real estate (F.I.R.E.) accounted for 6.8 percent of total jobs in Montana in 1986, compared to 7.6 percent nationwide and up from 4.4 percent in 1969. Between 1969 and 1986, this sector experienced strong growth, and total jobs increased every year, growing from 13,000 in 1969 to 28,000 in 1986, an increase of 116 percent. During the same period, wage/salary jobs grew from 8,100 to 13,800 for a change of 71.3 percent.

Not surprisingly, by 1986, more than half of the jobs in this sector were classified as self-employment, nearly all of which were in the real estate industry. Thus, considering only the wage/salary jobs shown in Table 2.6 most certainly understates the percentage growth of this sector between 1986 and 1987 as well as the distribution of jobs within the sector's industries. Nevertheless, since wage/salary jobs actually increased in 1987 and self-employment has been growing strongly in this sector in recent years, it is safe to say that 1987 was a year of growth for total jobs in this sector.

Two major exceptions to the 1980s general job growth pattern exist. The banking/credit institutions industry peaked in 1981, and the insurance carriers industry declined between 1981 and 1986, but increased in 1987.

Services accounted for 25 percent of total jobs in Montana in 1986, slightly less than the nationwide level of 25.6 percent, but up markedly from a 1969 level of 17.6 percent. Between 1969 and 1986, total jobs in this sector increased from about 51,000 to 102,000, or about 100 percent. Much of this increase was in self-employment, which accounted for one-third of the total jobs in this sector in 1986. Growth in wage/salary jobs during this period also was strong, particularly in private health services, the sector's largest employing industry. Other industries experiencing strong growth included private social services, business services, and hotels/lodging places. In the 1980s, growth has been strongest in business services, although the other industries generally have continued to grow. A significant exception to this growth is membership organizations, and most of the decline in this category has been in tribal organizations. Table 2.6 displays the strong growth that again characterized the service sector in 1987, when wage/salary jobs increased by 5 percent.

Government (federal, state, and local) accounted for 18.2 percent of total jobs in Montana in 1986, more than the national average of 15.5 percent, but down from 21 percent in 1969. A relatively high share of government jobs is typical of rural, sparsely populated states. Growth in government (especially at the state and local levels) during the 1970s was strong, and total government jobs peaked in 1978 despite declines in the military component after 1974. Between 1979 and 1986, declines in civilian and military federal government along with state government caused the total number of government jobs to decline. Jobs in local government grew slowly over this period. In 1987, losses in state and local government more than offset moderate growth in the federal component. As a result, jobs in this overall sector declined slightly in 1987, as detailed in Table 2.6.

Unemployment Rate

The unemployment rate for Montana generally has increased since 1969, as shown in Table 2.7 and Figure 2.7, following a nationwide trend. National recessions in 1974-1975 and 1980-1982 (Figure 2.7) intensified the increase. An unemployment rate of 7.4 percent in 1987 matches the post 1980-1982 recession low that occurred in 1984.

A qualitative relationship between the unemployment rate and the number of total jobs in the state held between 1970 and 1986. Comparing Figure 1.4 and Figure 2.7 shows that in years of national or statewide recession, growth in total jobs slowed or was negative while the unemployment rate increased, as in 1975. The strong recession of 1980-1982 produced stagnating or declining job growth and very high unemployment rates. Between 1982 and 1984, job growth returned, and the large jumps in the unemployment rate slowed in 1983 and then reversed in 1984. In 1985 and 1986, when the state experienced a recession, wage/salary jobs declined while growth in total jobs slowed, and the unemployment rate once again climbed upward. In contrast, the decline in the unemployment rate that occurred in 1987 was associated with an increase in wage/salary jobs, providing further support for this relationship.

Unemployment rates throughout the state varied greatly in 1987, from the low unemployment rate of 6.3 percent in the Helena and Bozeman regions to the high unemployment rate of 8.8 percent in the Kalispell Region (the result of the seasonal lumber/wood products industry). County level unemployment varied greatly, with a state low in McCone County of 2.8 percent, and a state high in Big Horn County of 13.6 percent. An overview of Montana's 1987 unemployment rates appears in Figure 2.8.

POPULATION

Population peaked in Montana in 1985 at 825,000 persons before declining to 809,000 in 1987 (Figure 2.10). Table 2.8 presents an historical look at Montana's population from 1890 to 1987. Between 1890 and 1920, population growth was exceptional, with several regions (Butte, Lewistown, and Miles City) reaching their peak. The period between 1920 and 1950 produced modest growth throughout the state, although growth varied substantially by region. Population declined in the Butte, Glasgow-Wolf Point, Glendive-Sidney, Havre, Lewistown, and Miles City regions. Growth was low to moderate in the rest of the state, with the exception of strong growth in the Kalispell Region.

The decades of the 1950s and the 1970s registered above average population growth, although the 1960s showed slow growth. Most of the fastest growing regions (Bozeman, Helena, Billings, and Missoula) showed strong growth around 1950, with the exception of the Kalispell Region. At the same time, the primarily agricultural regions of Glasgow-Wolf Point, Glendive-Sidney, Havre, Lewistown, and Miles City experienced weak growth or even population decline after 1950. Population in the Butte Region continued to decline after peaking in 1920, while population in the Great Falls Region reached a plateau around 1960 with little growth since.

Montana's population grew by 17 percent from 1969 to 1986 (Figure 2.10). Most of this growth, however, occurred in the 1970s; population grew by only 3 percent between 1979 and 1987. Regions growing faster than the state average for this later period were Helena, Kalispell, Bozeman, Missoula, Billings, and Miles City. Population in the remaining regions declined, with the largest decline occurring in the Butte Region.

A comparison of Figure 2.9 and Figure 2.10 provides insight into the relationship between population and total wage/salary jobs. Population

decline in 1986 and 1987 was due partly to the stagnation or decline of wage/salary jobs between 1979 and 1986 and slow growth of total jobs. It is possible that the decline in population in 1986 and 1987 was a delayed response to job stagnation and decline in previous years, or perhaps population growth for the 1980-1985 period was overestimated and the 1986 and 1987 estimates compensated for that phenomenon.

INCOME

Total Personal Income

In 1987, personal income totalled about \$10 billion. This comprehensive measure includes income from wages and salaries, employee benefits, income from self-employment, property income (interest, dividends, and rent), and transfer payments (such as social security, medical payments, and unemployment insurance). Table 2.9 reports total personal income at the state, regional, and county levels for 1959, 1969, and 1979-1987. All income and earnings data are presented in constant 1987 dollars.

Total personal income increased by 55 percent between 1969 and 1987, for an average annual growth rate of about 3.1 percent, slightly less than the national increase of 67 percent and the corresponding annual growth rate of 3.7 percent. Between 1979 and 1987, however, total Montana personal income grew more slowly, increasing by only 2 percent, or less than 0.3 percent per year compared to a national growth of 20 percent, or an average of 2.5 percent per year.

Table 2.10 illustrates total personal income growth in Montana's regions and counties. Income growth was moderate in the 1960s, strong in the 1970s, and weak between 1979 and 1986. Regions with growth greater than the state average between 1979 and 1986 included Bozeman, Glasgow-Wolf Point, Helena, Billings, Havre, and Kalispell, while the remaining regions grew more slowly. In several regions, total income actually decreased (Great Falls, Miles City, Lewistown, and Butte). It should be noted, however, that because only two years are presented in the table, some of the reported growth rates may be misleading. This condition is especially evident in regions where agriculture, a volatile sector, is a dominant industry, and exists to some extent at the state level, as shown in Figure 2.11. The instability of total personal income between 1979 and 1987 is partly because of instability in farm earnings, particularly in 1986.

Components of Personal Income

Figure 2.12 presents the numerous total personal income components and show how they have changed over time. The percentages include a 1969-1971 average and a 1984-1987 average so that volatility in agriculture is not a problem.

Nonfarm earnings, the largest component of personal income, accounted for 61 percent of income during the 1984-1987 period, down from 65 percent in 1969-1971. A comparison of Figure 2.11 and Figure 2.10 shows that nonfarm

earnings closely followed the path of wage/salary jobs between 1979 and 1986. The national recession in 1980-1982 produced a steady decline in nonfarm earnings until the recovery in 1983 and 1984. This recovery offset the decline in farm earnings, and total personal income increased as well. Nonfarm earnings declined in 1985 as a new recession occurred in Montana, and this decline continued in 1986 and 1987. Table 2.11 details nonfarm earnings for Montana's regions and counties. Not surprisingly, regions with high total personal income also had high nonfarm earnings.

Property Income and Transfer Payments. In recent years, the shares of property income (composed of interest payments, dividends on stocks, and rent) and transfer payments in total income have increased substantially. For the 1984-1987 period, property income accounted for 19 percent and transfer payments accounted for 17 percent of total personal income. These shares were up from 13 percent and 11 percent, respectively, in the 1969-1971 period.

As shown in Table 2.12 and Figure 2.11, property income increased substantially between 1979 and 1984, partly reflecting the high interest rates that accompanied the tight monetary policy of the U.S. Federal Reserve Board in the early 1980s. This growth contributed to total personal income growth, particularly in 1981. After 1984, property income leveled off and even declined slightly in 1987 (after adjusting for inflation).

Transfer payments experienced steady upward growth between 1979 and 1987, (Table 2.13 and Figure 2.11), contributing to an increase in total personal income over the entire period. Because transfer payments are generally a function of population, however, it is helpful to consider the performance of transfer payments relative to population. Between 1979 and 1987, transfer payments increased by 35 percent while population grew by only 3 percent. Thus, per capita transfer payments increased over this period.

Farm earnings accounted for an average of 2.3 percent of total personal income during the 1984-1987 period, down substantially from 10.7 percent during 1969-1971. This decline--seen both in the Montana economy and at the national level--represents a major trend away from agriculture and toward the service sectors. The distribution of farm earnings throughout the state differs significantly from that of other components of personal income, as shown in Table 2.14. In 1986, the top farm earnings regions were Great Falls, Billings, Glendive-Sidney, Havre, Glasgow-Wolf Point, and Miles City.

The performance of farm earnings between 1979 and 1987 was volatile (Figure 2.110). Earnings increased slightly between 1979 and 1981, and peaked in 1981. Between 1981 and 1985, farm earnings plummeted almost to zero, becoming negative in several of Montana's regions. Numerous factors were responsible for this period of hardship that existed for farmers in Montana and throughout the country. Early in the period, high interest rates hindered borrowing and made repayment of old debts difficult, overproduction reduced the price of agricultural goods, and inflation diminished domestic purchasing power while a strong dollar raised the price of U.S. products in foreign countries. Nationwide, farm earnings began to recover in 1984, but especially severe drought conditions in 1985 delayed Montana's recovery. Recovery began in

1986 and farm earnings increased dramatically, translating into an increase in total personal income during the year despite declines in nonfarm earnings. In 1987, farm earnings were estimated between \$400 and \$500 million, which is about the same (after adjusting for inflation) as existed in 1981, the previous peak in farm earnings.

Per Capita Income and Earnings Per Job. With a per capita income of \$12,350 in 1987, Montana ranked 40th in the nation. This figure was substantially less than the national average of \$15,500. But, as Table 2.15 indicates, the 1987 per capita income figure was generally higher in recent years, partly reflecting the farm earnings recovery in 1986 and 1987 and its influence on per capita income. When comparing average per capita income from 1982 to 1986, the regions ranked the following way (from highest per capita income to lowest): Billings, Helena, and Great Falls, all with per capita incomes greater than the Montana average; and Miles City, Butte, Glendive-Sidney, Bozeman, Missoula, Havre, Lewistown, Kalispell, and Glasgow-Wolf Point, all with per capita incomes less than the Montana average. Because of agriculture fluctuations in several of these regions, however, some of these ranks may be misleading. Table 2.16 provides more detail, presenting per capita income as a percent of the Montana average.

Studying earnings-per-job provides a particularly useful comparison between the farm sector and the nonfarm sector (Table 2.17 and Figure 2.13). Farm earnings per job were very high in 1969, even though 1969 was an average year for agriculture. By 1979, however, farm earnings per job were far less than nonfarm earnings per job. After reaching a low of less than \$100 per farm job in 1985, this figure increased dramatically in 1986 to \$11,700 per farm job. Preliminary data for 1987 indicate a continued increase in Montana's average farm earnings to about \$14,000.

Between 1979 and 1986, nonfarm earnings per job in Montana declined steadily from \$19,100 to \$16,800 for a loss of 12 percent after adjusting for inflation. Preliminary data for 1987 indicate a continued decline to about \$16,300. In contrast, nonfarm earnings per job for the nation were substantially higher at \$21,600 in 1979 and \$21,500 in 1986. The magnitude of the difference between Montana's figure and that for the nation may, in part, reflect cost-of-living differences. The sharp decline in nonfarm earnings per job, however, reflects a significant change in the Montana economy that did not occur nationally.

Figure 2.1

MONTANA REGIONS

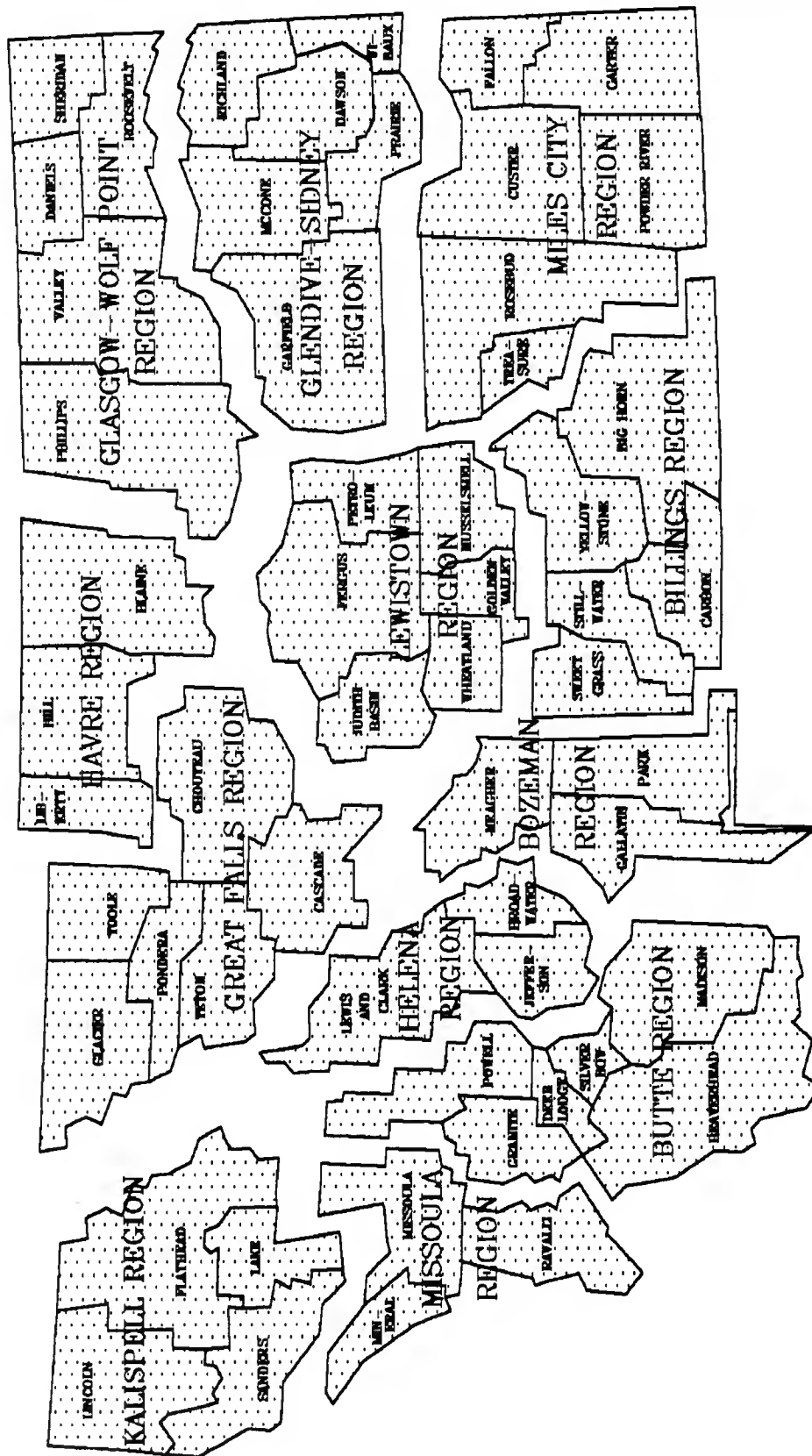


Table 2.1

TOTAL JOBS IN MONTANA BY REGION AND COUNTY: 1969 - 1986*

	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986
Montana	290,273	294,614	301,469	314,116	327,167	330,653	339,149	353,351	366,201	386,731	394,002	399,460	391,510	387,704	394,437	405,565	405,571	407,395
Billings Region	47,060	48,632	50,347	52,750	55,847	58,694	59,735	63,478	66,619	71,357	73,188	72,706	73,651	74,348	75,849	78,950	78,732	78,788
Big Horn	3,973	3,973	3,927	3,801	3,869	4,142	4,200	4,575	4,475	5,067	5,147	5,099	5,066	4,812	4,764	4,879	4,959	4,735
Carbon	2,720	2,695	2,740	2,802	2,911	2,947	2,910	2,890	2,975	3,071	3,104	3,098	3,171	3,171	3,367	3,474	3,483	3,531
Stillwater	1,776	1,821	1,860	1,943	1,947	2,007	1,961	2,026	2,057	2,236	2,236	2,227	2,244	2,268	2,325	2,395	2,390	2,479
Sweet Grass	1,357	1,347	1,450	1,443	1,529	1,500	1,523	1,529	1,501	1,516	1,531	1,502	1,520	1,535	1,534	1,593	1,564	1,566
Yellowstone	37,666	38,786	40,370	42,681	45,653	48,098	49,132	52,762	55,509	59,553	61,170	60,286	62,367	63,859	66,807	66,314	66,459	66,459
Bozeman Region	17,894	18,650	19,531	20,762	22,326	23,553	23,402	24,844	26,505	28,446	29,023	28,699	29,430	30,203	31,194	32,577	33,233	33,542
Gallatin	12,508	13,156	13,836	14,912	16,058	17,133	17,035	18,235	19,612	21,100	21,998	21,885	22,718	23,523	24,400	25,377	26,511	27,180
Meagher	4,916	5,194	5,421	5,928	6,492	7,028	7,526	8,066	8,622	9,201	9,827	10,495	11,208	11,955	12,740	13,560	14,421	15,311
Park	4,470	4,580	4,774	4,926	5,278	5,392	5,648	5,886	6,203	6,323	6,498	6,219	6,143	6,019	5,977	6,240	6,310	6,341
Butte Region	30,240	31,477	30,531	32,134	32,957	34,163	32,801	32,442	32,041	32,587	32,840	31,756	31,927	30,730	30,183	29,963	30,159	30,617
Deerhead	3,748	3,748	3,748	3,748	3,748	3,748	3,748	3,748	3,748	3,748	3,748	3,748	3,748	3,748	3,748	3,748	3,748	3,748
Granite	5,818	6,211	5,703	5,912	5,801	6,066	5,819	5,419	5,166	4,784	4,694	4,087	3,741	3,411	3,532	3,657	3,646	3,631
Great Falls	1,103	1,111	1,091	1,190	1,259	1,287	1,151	1,131	1,093	1,159	1,128	1,168	1,131	1,144	1,125	1,220	1,195	1,225
Madison	2,238	2,240	2,282	2,327	2,425	2,494	2,350	2,342	2,410	2,462	2,453	2,656	2,775	2,853	2,888	2,892	2,892	3,005
Powell	2,569	2,550	2,681	2,757	2,766	2,910	2,974	3,067	3,021	3,068	3,065	3,951	2,843	2,959	3,015	3,015	3,068	3,052
Silver Bow	15,268	16,148	15,368	16,539	17,319	17,753	16,898	16,776	16,675	17,243	17,425	17,038	17,553	16,239	15,509	15,070	15,237	15,428
Glacier-Sidney Region	13,765	13,612	13,509	13,807	14,503	14,907	14,618	15,059	15,182	16,017	16,707	17,608	16,851	18,206	16,851	17,121	16,423	15,527
Dawson	3,405	3,510	3,426	3,598	3,792	3,903	3,819	3,879	3,856	4,206	4,385	4,605	4,720	4,956	4,623	4,720	4,601	4,720
Deerfield	1,408	1,408	1,408	1,408	1,408	1,408	1,408	1,408	1,408	1,408	1,408	1,408	1,408	1,408	1,408	1,408	1,408	1,408
Prentiss	6,848	6,810	6,683	6,800	6,922	6,948	6,943	7,081	7,081	7,571	7,571	7,571	7,571	7,571	7,571	7,571	7,571	7,571
Richland	4,382	4,489	4,380	4,463	4,679	4,925	4,801	5,159	5,392	5,924	6,376	7,140	8,313	7,470	6,703	7,121	6,703	6,115
Wibaux	601	617	609	657	758	737	634	677	667	710	699	678	685	678	685	658	650	655
Great Falls Region	51,476	51,894	52,503	53,953	55,191	56,426	55,974	59,523	59,987	62,088	62,959	60,557	59,770	58,293	58,748	59,466	58,402	59,090
Cascade	36,259	36,401	36,836	37,962	39,377	39,145	39,145	42,991	42,991	43,884	44,249	42,449	41,551	40,546	40,912	41,578	40,908	41,516
Chouteau	3,043	2,953	3,004	3,034	3,070	3,261	3,011	2,926	2,798	2,830	2,819	2,807	2,892	2,842	2,885	2,841	2,775	2,853
Glacier	4,079	4,135	4,352	4,596	4,770	4,868	5,149	5,357	5,589	5,916	6,002	6,052	5,867	5,974	5,922	5,843	5,705	5,823
Pondera	2,611	2,611	2,817	2,894	2,821	2,815	2,821	3,039	3,248	3,248	3,248	3,248	3,248	3,248	3,248	3,248	3,248	3,248
Teton	2,692	2,590	2,581	2,676	2,691	2,836	2,714	2,729	2,729	2,729	2,729	2,729	2,729	2,729	2,729	2,729	2,729	2,729
Tooie	2,792	2,914	2,913	2,789	2,892	3,113	3,134	3,181	3,236	3,400	3,341	3,303	3,332	3,396	3,377	3,353	3,238	3,205
Havre Region	11,302	11,491	11,645	12,038	12,316	12,594	12,891	13,320	13,575	14,032	14,380	13,858	13,713	13,280	13,372	13,372	13,372	13,074
Hill	2,746	2,728	2,691	2,768	2,802	2,874	2,840	2,952	2,904	3,015	3,092	2,969	2,908	2,808	2,928	2,932	2,998	2,935
Hill	7,482	7,593	7,793	8,061	8,612	8,679	8,855	9,201	9,513	9,812	10,057	9,760	9,636	9,393	9,240	8,960	8,960	8,960
Liberty	1,172	1,170	1,161	1,170	1,145	1,213	1,196	1,177	1,158	1,185	1,231	1,224	1,208	1,188	1,199	1,180	1,180	1,180
Helena Region	19,300	19,919	20,705	21,511	22,185	22,745	23,555	25,346	26,812	28,037	28,863	29,248	29,615	29,670	30,602	31,723	32,530	33,099
Broadwater	1,038	1,032	1,097	1,138	1,169	1,264	1,320	1,425	1,425	1,543	1,646	1,646	1,474	1,454	1,521	1,584	1,584	1,584
Jefferson	1,852	1,844	1,847	1,888	1,919	1,893	1,946	2,076	2,100	2,123	2,145	2,237	2,356	2,605	2,680	2,919	3,009	3,041
Lewis & Clark	16,490	17,023	17,761	18,485	19,077	19,588	20,329	21,950	23,287	24,391	25,072	25,550	25,985	25,611	26,281	27,213	27,937	28,512
Kalispell Region	29,641	29,332	31,001	32,593	34,293	34,468	34,459	36,514	38,743	41,968	43,029	41,930	41,351	40,892	43,658	46,386	47,012	47,379
Flathead	14,976	15,124	16,085	17,042	18,397	19,971	19,133	20,485	22,955	23,979	24,832	24,308	23,716	23,396	25,101	27,401	28,127	28,074
Lake	4,639	4,536	4,817	5,290	5,663	5,634	5,469	5,795	6,045	6,196	6,281	6,247	6,258	6,279	6,281	6,281	6,281	6,281
Lincoln	7,411	7,042	6,951	7,007	6,841	6,457	6,272	6,408	6,393	6,398	6,397	6,307	6,363	6,363	6,363	6,363	6,363	6,363
Sanders	2,615	2,690	3,048	3,254	3,402	3,506	3,585	3,826	3,926	3,926	3,926	3,926	3,926	3,926	3,926	3,926	3,926	3,926
Lewistown Region	10,262	10,230	10,271	10,174	10,442	10,783	10,489	10,551	10,669	11,048	11,304	11,095	11,155	10,919	10,912	11,037	11,061	11,119
Fergus	5,471	5,440	5,440	5,440	5,440	5,440	5,440	5,440	5,440	5,440	5,440	5,440	5,440	5,440	5,440	5,440	5,440	5,440
Golden Valley	1,259	1,259	1,259	1,259	1,259	1,259	1,259	1,259	1,259	1,259	1,259	1,259	1,259	1,259	1,259	1,259	1,259	1,259
Madison Basin	1,524	1,524	1,524	1,524	1,524	1,524	1,524	1,524	1,524	1,524	1,524	1,524	1,524	1,524	1,524	1,524	1,524	1,524
Petroleum	1,378	1,378	1,378	1,378	1,378	1,378	1,378	1,378	1,378	1,378	1,378	1,378	1,378	1,378	1,378	1,378	1,378	1,378
Wheatland	1,228	1,228	1,228	1,228	1,228	1,228	1,228	1,228	1,228	1,228	1,228	1,228	1,228	1,228	1,228	1,228	1,228	1,228
Miles City Region	12,796	12,664	12,975	13,199	13,693	14,763	16,193	15,619	15,345	15,851	16,339	17,142	18,075	19,212	18,890	17,756	17,097	16,858
Carver	1,034	1,005	998	964	942	957	909	899	880	898	947	945	971	973	957	948	935	956
Custer	5,481	5,377	5,489	5,555	5,678	6,124	6,311	6,342	6,548	6,870	6,933	7,060	6,748	6,587	6,710	6,860	6,788	6,759
Fallon	1,774	1,800	1,774	1,774	1,774	1,774	1,774	1,774	1,774	1,774	1,774	1,774	1,774	1,774	1,774	1,774	1,774	1,774
Powder River	1,405	1,316	1,316	1,316	1,316	1,316	1,316	1,316	1,316	1,316	1,316	1,316	1,316	1,316	1,316	1,316	1,316	1,316
Robidoux	2,583	2,633	2,912	3,132	3,517	3,919	5,276	4,637	4,143	4,203	4,455	5,100	6,354	7,669	7,353	6,140	5,630	5,449
Treasure	519	513	489	487	514	504	498	490	476	488	489	479	461	457	466	455	455	455
Missoula Region	30,307	30,556	32,238	34,351	36,291	37,811	37,801	40,784	44,022	48,309	49,061	47,806	46,163	45,036	47,408	50,092	51,593	51,593
Mineral	1,245	1,174	1,222	1,175	1,421	1,442	1,440	1,440	1,440	1,440	1,440	1,440	1,440	1,440	1,440	1,440	1,440	1,440
Missoula	24,279	24,611	25,968	27,673	29,134	30,291	31,049	33,049	35,921	39,506	39,984	38,567	37,066	36,158	37,871	40,074	40,828	41,331
Ravalli	4,763	4,771	5,068	5,503	5,720	5,678	5,678	6,239	6,599	7,237	7,463	7,375	7,571	7,485	7,940</			

Figure 2.2

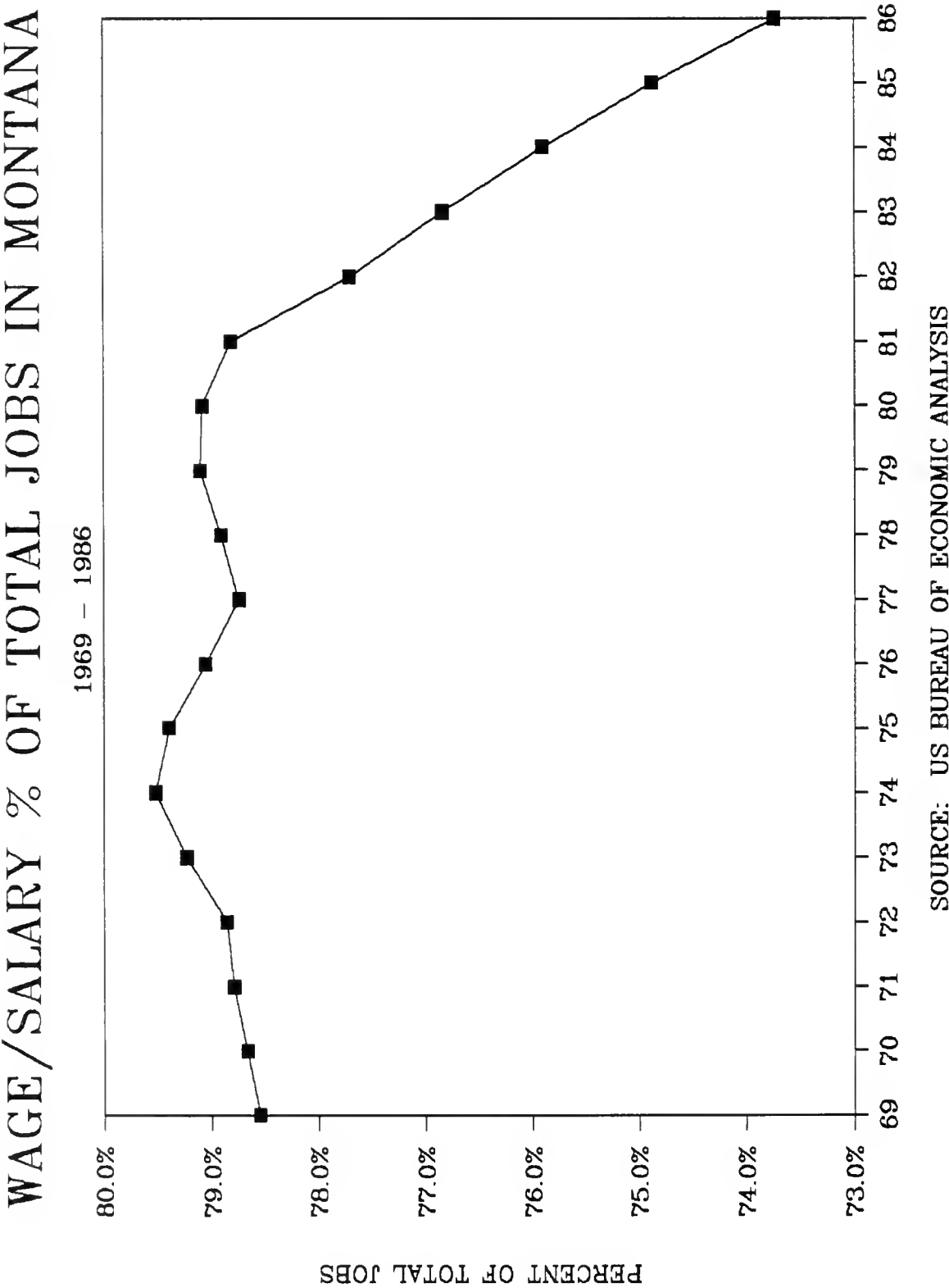


Table 2.2

WAGE AND SALARY EMPLOYMENT IN MONTANA BY REGION AND COUNTY: 1969 - 1986

	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986
Montana	228,010	231,758	237,535	247,701	259,216	269,279	289,255	279,338	288,357	305,154	311,654	307,980	308,563	301,340	303,086	307,821	303,895	300,389
Billings Region	37,768	39,093	40,500	42,352	45,064	47,551	48,313	51,320	53,696	57,675	59,537	59,310	59,738	59,571	60,196	61,691	60,569	59,567
Big Horn	2,558	2,972	3,001	3,222	2,953	3,232	3,306	3,350	3,622	4,087	4,154	4,226	4,139	3,854	3,972	4,127	3,858	3,596
Carbon	1,462	1,474	1,628	1,648	1,660	1,680	1,699	1,675	1,739	1,805	1,808	1,808	1,879	1,831	1,924	1,949	1,922	1,916
Stillwater	948	976	1,055	1,094	1,127	1,201	1,169	1,204	1,199	1,258	1,364	1,405	1,425	1,368	1,439	1,491	1,411	1,465
Sweet Grass	832	844	941	933	954	979	984	995	969	955	966	950	976	949	920	944	919	892
Yellowstone	31,970	32,817	33,970	35,849	38,370	40,451	41,155	44,096	46,187	49,570	51,245	50,521	51,319	51,569	52,203	53,542	52,459	51,698
Bozeman Region	14,202	14,912	15,580	16,655	18,129	19,105	18,697	19,734	20,876	22,290	22,932	22,752	23,301	23,817	24,169	24,855	25,153	25,022
Gallatin	10,240	10,804	11,326	12,244	13,331	14,178	13,878	14,734	15,708	16,819	17,912	17,590	17,955	18,650	19,204	19,784	20,500	19,977
Meagher	632	644	643	669	707	751	643	640	622	654	707	685	668	661	657	661	657	661
Park	3,330	3,464	3,619	3,742	4,091	4,176	4,176	4,354	4,456	4,817	5,012	4,777	4,678	4,511	4,308	4,451	4,446	4,384
Butte Region	25,666	26,892	25,867	27,248	28,047	29,323	27,846	27,065	26,661	26,930	27,071	25,944	26,110	24,608	23,867	23,493	23,405	23,503
Beaverhead	2,452	2,492	2,501	2,560	2,560	2,609	2,740	2,705	2,716	2,828	2,860	2,923	2,929	2,989	3,001	2,986	2,935	3,027
Deer Lodge	5,358	5,773	5,309	5,268	5,268	5,509	5,267	5,403	4,794	4,794	4,101	3,497	3,331	2,985	2,905	3,060	3,072	2,967
Groenle	754	774	796	796	875	875	771	750	750	750	750	750	750	750	750	750	750	750
Madison	1,418	1,462	1,505	1,595	1,621	1,526	1,526	1,478	1,487	1,480	1,480	1,480	1,480	1,480	1,480	1,480	1,480	1,480
Powell	2,054	2,039	2,160	2,243	2,214	2,343	2,384	2,384	2,384	2,384	2,384	2,384	2,384	2,384	2,384	2,384	2,384	2,384
Silver Bow	13,631	14,456	13,642	14,764	15,555	15,592	15,158	14,980	14,809	15,319	15,389	14,593	15,405	13,989	13,239	12,651	12,667	12,694
Glacier-Wolf Point Region	10,160	10,145	10,475	10,987	11,267	11,862	11,756	11,594	11,249	11,565	11,793	11,738	12,331	11,799	11,481	11,582	11,227	10,885
Danells	761	749	789	797	812	844	859	887	864	912	906	848	912	970	873	848	805	789
Phillips	1,228	1,289	1,337	1,369	1,420	1,523	1,487	1,438	1,374	1,482	1,608	1,688	1,642	1,604	1,661	1,725	1,583	1,691
Roosevelt	3,184	2,996	3,015	3,106	3,178	3,295	3,408	3,504	3,511	3,613	3,648	3,614	3,775	3,919	3,992	4,033	4,021	3,846
Sheridan	1,295	1,301	1,330	1,377	1,443	1,529	1,544	1,610	1,710	1,833	1,833	1,964	2,229	2,006	1,932	1,840	1,760	1,634
Valley	3,692	3,810	4,004	4,338	4,414	4,671	4,458	4,155	3,891	3,848	3,797	3,624	3,773	3,624	3,123	3,136	3,058	2,925
Glendive-Sidney Region	9,102	9,076	9,142	9,556	10,004	10,449	10,468	10,818	10,952	11,770	12,376	13,338	14,688	13,727	12,212	12,364	11,923	10,444
DeWitt	4,147	4,016	4,019	4,223	4,481	4,596	4,522	4,614	4,676	4,979	5,126	5,350	5,709	5,588	4,995	4,815	4,462	4,102
McGrath	730	721	731	761	803	791	794	803	803	865	890	835	820	859	534	527	516	514
Pringle	472	475	503	533	575	597	608	632	637	672	684	684	684	684	684	684	684	684
Richland	2,915	3,037	3,002	3,088	3,180	3,226	3,480	3,720	3,720	4,172	4,367	4,814	6,737	5,921	5,064	4,587	4,323	4,307
Wibaux	329	324	292	309	309	340	317	354	337	394	4,380	5,367	3,74	3,74	3,74	3,74	3,311	3,307
Great Falls Region	41,817	42,847	43,614	43,630	44,821	45,898	45,594	47,627	48,779	50,580	50,449	49,141	48,237	46,442	46,400	46,448	44,804	43,759
Cascade	32,211	32,300	32,467	32,259	34,021	34,525	34,814	36,777	37,904	37,904	37,904	36,777	35,992	35,992	34,086	34,230	33,131	31,257
Chouteau	1,458	1,454	1,554	1,598	1,650	1,867	1,707	1,644	1,518	1,545	1,658	1,620	1,687	1,654	1,637	1,583	1,496	1,453
Glacier	3,285	3,299	3,501	3,713	3,869	3,977	4,040	4,338	4,638	4,937	4,984	5,018	4,932	4,424	4,424	4,424	4,151	4,120
Pondera	1,542	1,750	1,787	1,812	1,844	1,811	1,845	2,034	2,207	2,207	2,279	2,247	2,301	2,242	2,266	2,210	2,161	2,161
Teton	1,464	1,291	1,340	1,384	1,446	1,549	1,477	1,509	1,519	1,637	1,694	1,727	1,880	1,859	1,739	1,777	1,649	1,632
Tooie	1,857	1,953	1,985	1,864	1,972	2,169	2,202	2,186	2,208	2,350	2,350	2,393	2,404	2,271	2,227	2,218	2,167	2,086
Hayden Region	8,055	8,153	8,400	8,843	9,141	9,381	9,598	10,000	10,201	10,619	10,923	10,459	10,326	9,955	9,740	9,750	9,401	9,197
Blaine	1,687	1,736	1,767	1,910	1,872	1,917	1,972	2,044	1,962	2,067	2,109	1,921	1,907	1,839	1,921	1,921	1,886	1,886
Mill	5,786	5,840	6,025	6,315	6,637	6,778	6,935	7,255	7,466	7,825	8,033	7,738	7,631	7,337	7,138	7,069	6,956	6,984
Liberty	582	577	608	618	632	686	691	701	693	727	781	809	788	779	771	760	730	727
Helena Region	16,677	17,070	17,895	18,364	18,966	19,420	20,096	21,334	22,447	23,355	23,842	23,959	24,187	23,295	24,248	24,248	25,189	25,324
Broadwater	6,677	6,609	6,822	6,822	6,822	6,822	6,822	6,822	6,822	6,822	6,822	6,822	6,822	6,822	6,822	6,822	6,822	6,822
Jefferson	1,443	1,432	1,425	1,466	1,466	1,466	1,466	1,466	1,466	1,466	1,466	1,466	1,466	1,466	1,466	1,466	1,466	1,466
Lewis & Clark	14,587	14,989	15,746	16,268	16,731	17,151	17,777	18,997	20,038	20,877	21,302	21,551	21,744	21,192	21,498	21,915	22,318	22,532
Kalispell Region	23,573	23,198	24,324	25,459	26,875	26,949	26,555	27,937	29,512	32,118	33,045	31,968	31,240	30,099	31,973	33,726	33,879	33,604
Flathead	12,193	12,186	12,861	13,548	14,675	14,985	15,039	16,077	17,321	18,958	19,698	19,193	18,514	17,834	18,962	20,562	20,989	20,548
Lake	2,980	2,840	3,120	3,434	3,715	3,752	3,639	3,732	3,901	4,491	4,586	4,461	4,603	4,632	4,810	4,926	5,289	5,326
Lincoln	6,479	6,150	6,014	6,005	5,853	5,409	5,132	5,197	5,352	5,868	5,904	5,445	5,514	5,198	5,008	5,536	5,434	5,564
Sanders	1,921	2,012	2,329	2,432	2,632	2,703	2,745	2,931	2,938	2,901	2,857	2,869	2,609	2,435	2,593	2,702	2,167	2,166
Lewistown Region	6,377	6,431	6,474	6,364	6,583	6,929	6,718	6,814	6,743	7,030	7,251	7,129	7,230	6,801	6,558	6,612	6,535	6,433
Fergus	3,564	3,593	3,604	3,465	3,609	3,869	3,764	3,857	3,970	4,210	4,373	4,282	4,217	3,909	3,910	3,859	3,827	3,746
Golden Valley	163	164	170	185	189	210	185	173	158	154	174	173	194	180	177	193	203	228
Judith Basin	594	592	606	613	624	628	579	563	551	551	593	565	599	516	572	582	566	577
Musselshell	976	1,041	1,083	1,114	1,159	1,219	1,221	1,274	1,176	1,244	1,254	1,283	1,332	1,354	1,227	1,186	1,167	1,092
Wheatland	210	181	181	178	197	204	181	166	153	153	164	145	138	129	132	128	128	128
Wheatland	856	830	810	811	805	799	788	781	744	718	693	681	650	643	632	632	644	637
Miles City Region	8,877	9,838	9,246	9,424	10,017	11,025	12,430	11,967	11,406	11,798	12,268	13,189	14,029	15,067	14,590	13,278	12,495	12,078
Carver	434	445	468	465	470	492	450	441	425	445	463	475	495	495	462	451	437	451
Custer	4,370	4,287	4,409	4,376	4,509	4,861	4,972	4,970	5,114	5,366	5,476	5,662	5,329	5,137	5,208	5,228	5,091	4,973
Fallon	1,164	1,174	1,155	1,163	1,171	1,310	1,332	1,394	1,421	1,465	1,523	1,594	1,550	1,462	1,380	1,378	1,303	1,220
Powder River	780	770	735	740	745	826	770	767	796	842	872	840	855	872	813	717	716	689
Rosebud	1,850	1,904	2,182	2,393	2,800	3,219	4,582	3,913	3,399	3,670	3,670	3,670	3,670	3,670	3,670	3,670	3,670	3,670
Treasure	295	296	297	297	322	327												

Table 2.3

WAGE & SALARY EMPLOYMENT IN MONTANA REGIONS AND COUNTIES*: 1986-1987

REGION	1986	1987	CHANGE	PERCENT CHANGE
Montana	263,662	264,285	623	0.2%
Billings Region	51,437	51,054	(383)	-0.7%
Big Horn	2,941	2,870	(71)	-2.4%
Carbon	1,571	1,473	(98)	-6.2%
Stillwater	1,180	1,374	194	16.4%
Sweet Grass	652	678	26	4.0%
Yellowstone	45,093	44,659	(434)	-1.0%
Bozeman Region	20,477	20,227	(250)	-1.2%
Gallatin	16,777	16,662	(115)	-0.7%
Meagher	481	465	(16)	-3.3%
Park	3,219	3,100	(119)	-3.7%
Butte Region	19,818	20,185	367	1.9%
Beaverhead	2,456	2,474	18	0.7%
Deer Lodge	2,614	2,538	(76)	-2.9%
Granite	590	652	62	10.5%
Madison	1,295	1,331	36	2.8%
Powell	1,973	1,918	(55)	-2.8%
Silver Bow	10,890	11,272	382	3.5%
Glasgow-Wolf Point Region	8,957	8,832	(125)	-1.4%
Daniels	595	612	17	2.9%
Phillips	1,384	1,382	(2)	-0.1%
Roosevelt	3,311	3,235	(76)	-2.3%
Sheridan	1,320	1,316	(4)	-0.3%
Valley	2,347	2,287	(60)	-2.6%
Glendive-Sidney Region	8,385	7,783	(602)	-7.2%
Dawson	3,335	3,084	(251)	-7.5%
Garfield	294	270	(24)	-8.2%
McCone	524	519	(5)	-1.0%
Prairie	322	309	(13)	-4.0%
Richland	3,673	3,379	(294)	-8.0%
Wibaux	237	222	(15)	-6.3%
Great Falls Region	34,909	34,993	84	0.2%
Cascade	25,974	26,050	76	0.3%
Chouteau	1,014	995	(19)	-1.9%
Glacier	3,567	3,579	12	0.3%
Pondera	1,530	1,517	(13)	-0.8%
Teton	1,252	1,285	33	2.6%
Toole	1,572	1,567	(5)	-0.3%
Havre Region	6,945	6,897	(48)	-0.7%
Blaine	1,476	1,497	21	1.4%
Hill	5,013	4,930	(83)	-1.7%
Liberty	456	470	14	3.1%
Helena Region	22,803	23,394	591	2.6%
Broadwater	730	719	(11)	-1.5%
Jefferson	1,768	1,910	142	8.0%
Lewis & Clark	20,305	20,765	460	2.3%
Kalispell Region	29,979	30,759	780	2.6%
Flathead	18,408	18,786	378	2.1%
Lake	4,504	4,759	255	5.7%
Lincoln	5,116	5,173	57	1.1%
Sanders	1,951	2,041	90	4.6%
Lewistown Region	5,094	5,001	(93)	-1.8%
Fergus	3,155	3,142	(13)	-0.4%
Golden Valley	151	117	(34)	-22.5%
Judith Basin	358	351	(7)	-2.0%
Musselshell	878	854	(24)	-2.7%
Petroleum	74	65	(9)	-12.2%
Wheatland	478	472	(6)	-1.3%
Miles City Region	10,065	9,678	(387)	-3.8%
Carter	263	255	(8)	-3.0%
Custer	4,290	4,263	(27)	-0.6%
Fallon	1,000	899	(101)	-10.1%
Powder River	469	443	(26)	-5.5%
Rosebud	3,857	3,658	(199)	-5.2%
Treasure	186	160	(26)	-14.0%
Missoula Region	34,721	35,405	684	2.0%
Mineral	991	984	(7)	-0.7%
Missoula	29,174	29,674	500	1.7%
Ravalli	4,556	4,747	191	4.2%
Unidentified by Region or County	10,048	10,054	6	0.1%

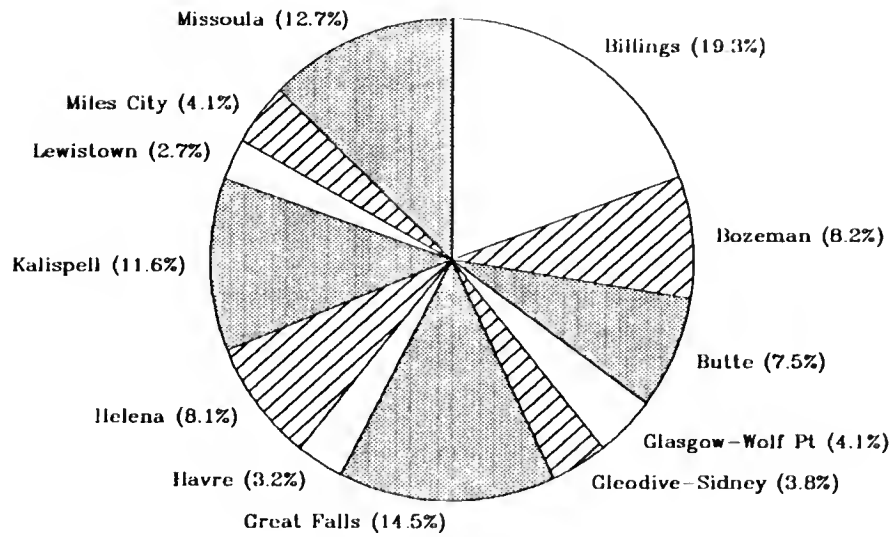
*Includes only employment covered by the Unemployment Insurance Program.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.3

REGIONAL SHARES OF MONTANA JOBS 1986

SOURCE: US BUREAU OF ECONOMIC ANALYSIS



REGIONAL SHARES OF MONTANA JOBS 1969

SOURCE: US BUREAU OF ECONOMIC ANALYSIS

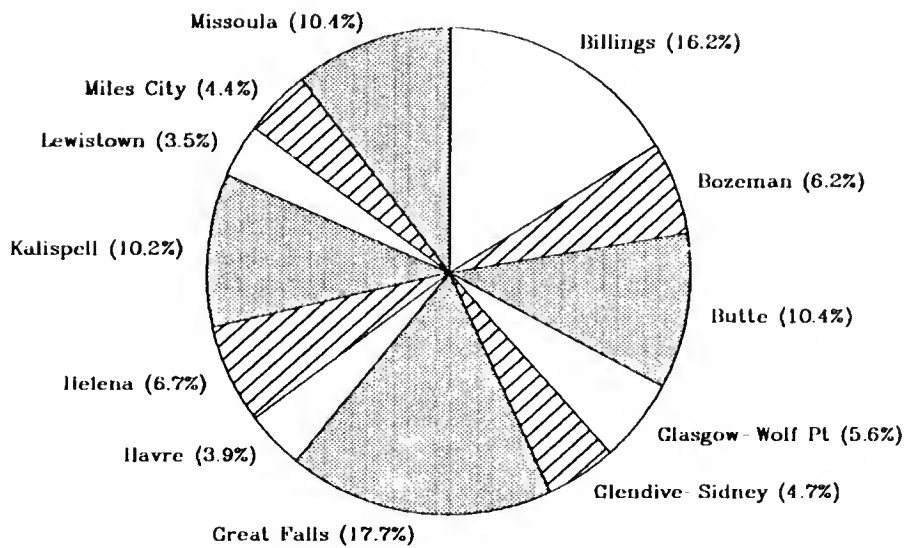


Figure 2.4

% CHANGE IN TOTAL JOBS 1979 - 1986

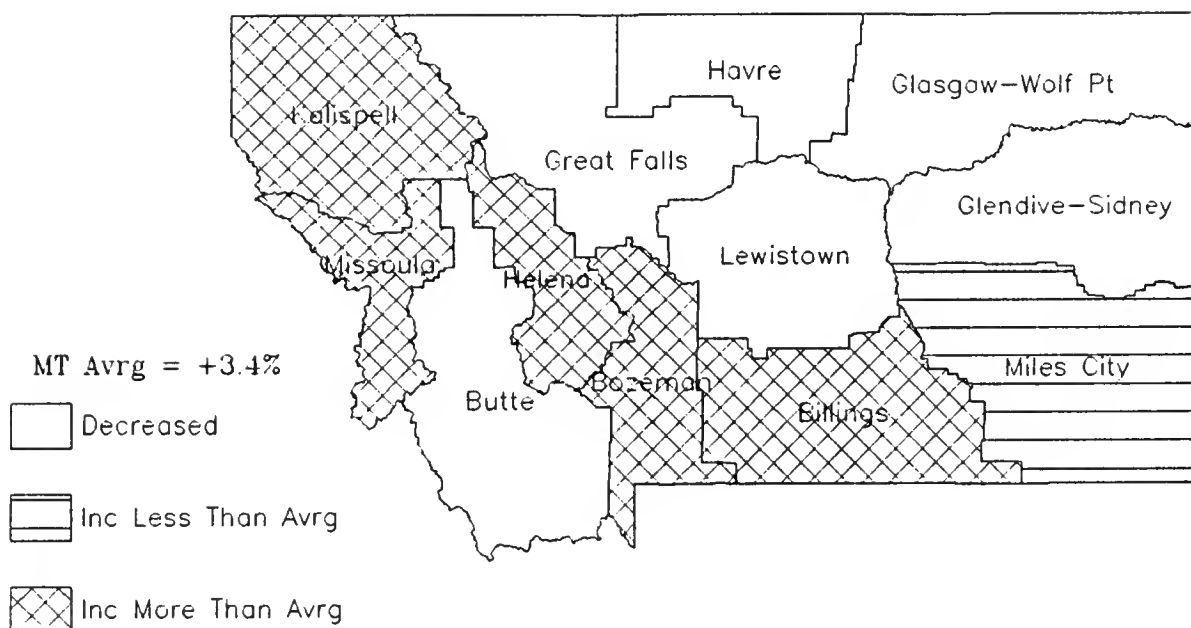


Table 2.4

PERCENT CHANGE IN TOTAL NUMBER OF JOBS BY REGION: 1969 - 1986

Region	1969-1986		1969-1979		1979-1986	
	% Change	Annual % Change	% Change	Annual % Change	% Change	Annual % Change
Montana	40.3%	2.4%	35.7%	3.6%	3.4%	0.5%
Billings Region	67.4%	4.0%	55.5%	5.6%	7.7%	1.1%
Bozeman Region	87.4%	5.1%	62.2%	6.2%	15.6%	2.2%
Butte Region	1.2%	0.1%	8.6%	0.9%	-6.8%	-1.0%
Glasgow-Wolf Point Region	3.5%	0.2%	6.6%	0.7%	-2.9%	-0.4%
Glendive-Sidney Region	12.8%	0.8%	21.4%	2.1%	-7.1%	-1.0%
Great Falls Region	14.8%	0.9%	20.6%	2.1%	-4.8%	-0.7%
Havre Region	15.7%	0.9%	27.2%	2.7%	-9.1%	-1.3%
Helena Region	70.8%	4.2%	48.9%	4.9%	14.7%	2.1%
Kalispell Region	59.8%	3.5%	45.2%	4.5%	10.1%	1.4%
Lewistown Region	8.4%	0.5%	10.2%	1.0%	-1.6%	-0.2%
Miles City Region	31.7%	1.9%	27.7%	2.8%	3.2%	0.5%
Missoula Region	70.2%	4.1%	61.9%	6.2%	5.2%	0.7%

Source: U.S. Bureau of Economic Analysis. Prepared by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Table 2.4 a

PERCENT CHANGE IN WAGE AND SALARY JOBS BY REGION: 1969 - 1986

Region	1969-1986		1969-1979		1979-1986	
	1969-1986 % Change	Annual % Change	1969-1979 % Change	Annual % Change	1979-1986 % Change	Annual % Change
Montana	31.7%	1.9%	36.7%	3.7%	-3.6%	-0.5%
Billings Region	57.7%	3.4%	57.6%	5.8%	0.1%	0.0%
Bozeman Region	76.2%	4.5%	61.5%	6.1%	9.1%	1.3%
Butte Region	-8.4%	-0.5%	5.5%	0.5%	-13.2%	-1.9%
Glasgow-Wolf Point Region	7.1%	0.4%	16.1%	1.6%	-7.7%	-1.1%
Glendive-Sidney Region	14.7%	0.9%	36.0%	3.6%	-15.6%	-2.2%
Great Falls Region	7.1%	0.4%	20.7%	2.1%	-11.2%	-1.6%
Havre Region	14.2%	0.8%	35.6%	3.6%	-15.8%	-2.3%
Helena Region	51.8%	3.0%	43.0%	4.3%	6.2%	0.9%
Kalispell Region	42.6%	2.5%	40.2%	4.0%	1.7%	0.2%
Lewistown Region	0.9%	0.1%	13.7%	1.4%	-11.3%	-1.6%
Miles City Region	36.1%	2.1%	38.2%	3.8%	-1.5%	-0.2%
Missoula Region	53.6%	3.2%	56.0%	5.6%	-1.5%	-0.2%

Source: U.S. Bureau of Economic Analysis. Regional data computed by the Office for Research and Information Services, Montana Department of Commerce, 1988.

Table 2.5

EMPLOYMENT GROWTH RATES FOR MONTANA REGIONS

	WAGE & SALARY JOBS GROWTH RATES	SELF-EMPLOYED GROWTH RATES	TOTAL JOBS GROWTH RATES
	1979-1986 -----	1979-1986 -----	1979-1986 -----
Montana	-3.6%	29.9%	3.4%
Billings Region	0.1%	40.8%	7.7%
Bozeman Region	9.1%	39.9%	15.6%
Butte Region	-13.2%	23.3%	-6.8%
Glasgow-Wolf Point Region	-7.7%	7.5%	-2.9%
Glendive-Sidney Region	-15.6%	17.4%	-7.1%
Great Falls Region	-11.2%	23.3%	-4.8%
Havre Region	-15.8%	12.1%	-9.1%
Helena Region	6.2%	54.8%	14.7%
Kalispell Region	1.7%	38.0%	10.1%
Lewistown Region	-11.3%	15.6%	-1.6%
Miles City Region	-1.5%	17.4%	3.2%
Missoula Region	-1.5%	35.4%	5.2%

Source: U.S. Bureau of Economic Analysis. Regional data computed by the Office for Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.5

Self-Employment in Montana

1986

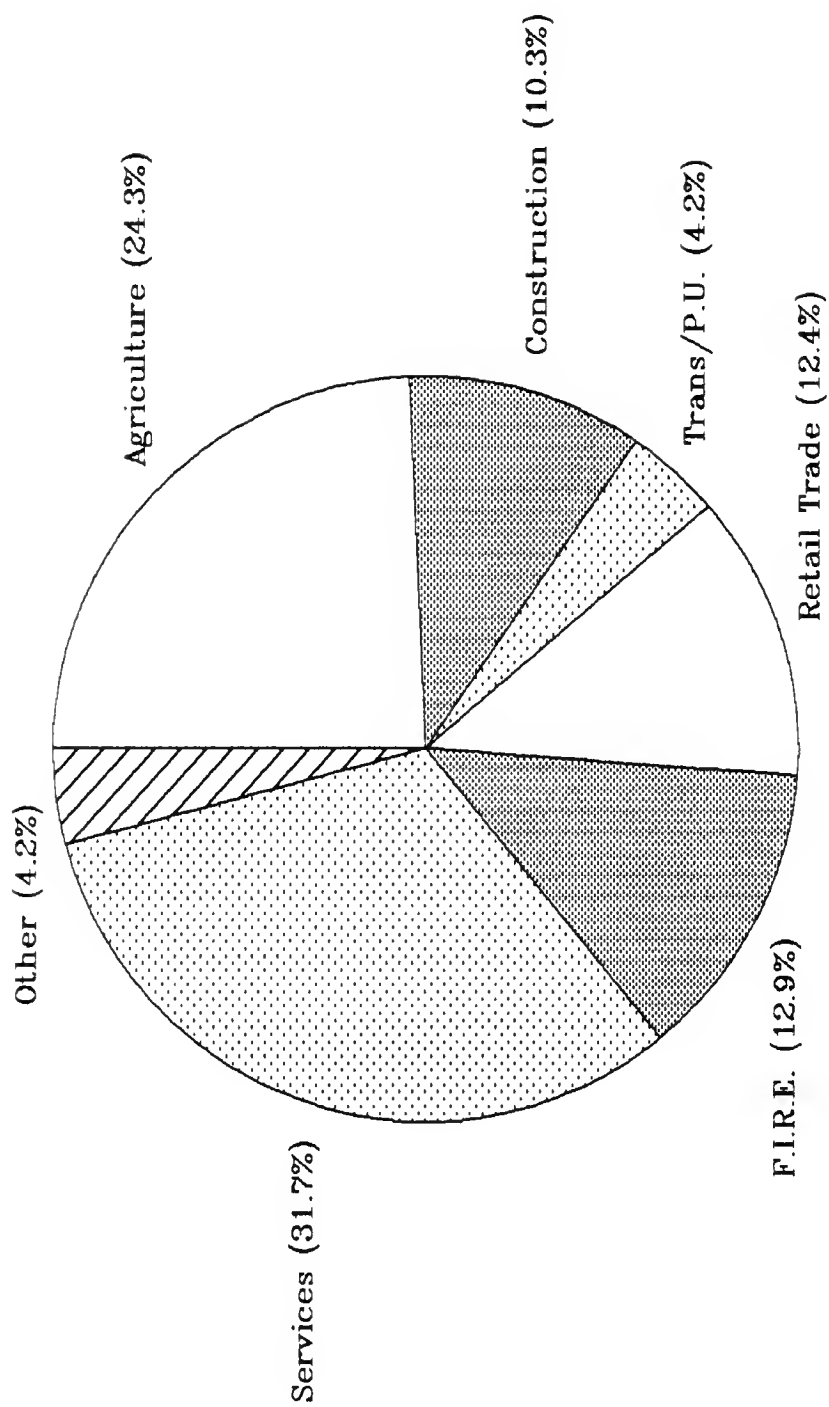
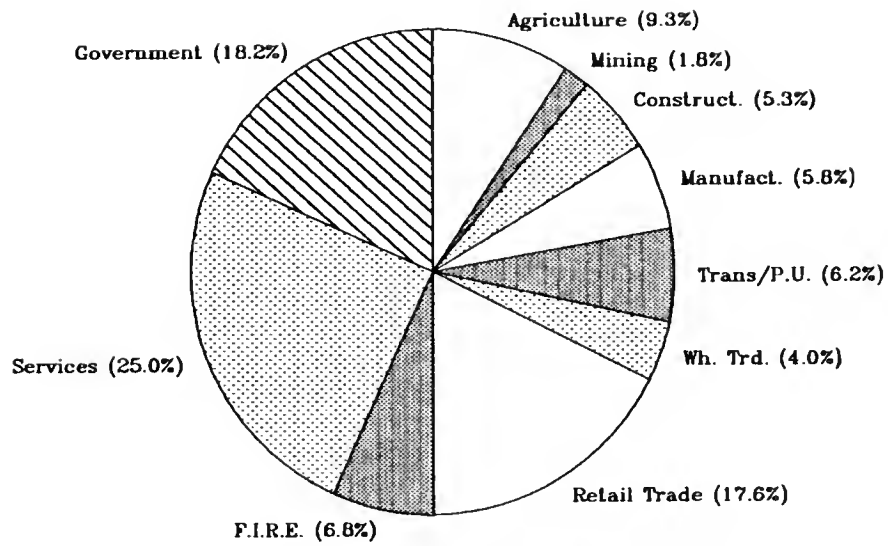


Figure 2.6

JOBS IN MONTANA

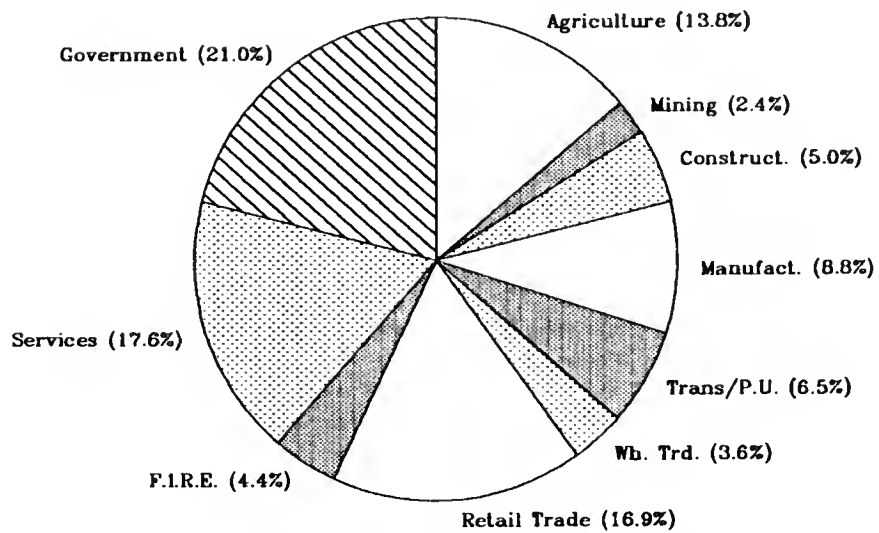
1986



SOURCE: US BUREAU OF ECONOMIC ANALYSIS

JOBS IN MONTANA

1969



SOURCE: US BUREAU OF ECONOMIC ANALYSIS

Table 2.6

WAGE & SALARY EMPLOYMENT IN MONTANA*: 1986-1987

INDUSTRY	SIC** CODE	1986	1987	CHANGE	PERCENT CHANGE
Total Wage and Salary Employment		263,662	264,285	623	0.2%
Total Private		201,933	202,846	913	0.5%
Agriculture, Forestry, Fishing, Hunting, & Trapping		E 2,910	E 2,968	E 58	E 2.0%
Agricultural Production--Crops ***	01	592	585	(7)	-1.2%
Agricultural Production--Livestock ***	02	1,200	1,205	5	0.4%
Agricultural Services	07	896	973	77	8.6%
Forestry	08	222	205	(17)	-7.7%
Fishing, Hunting, and Trapping	09	"0"	"0"	"0"	"0"
Mining		5,800	5,767	(33)	-0.6%
Metal Mining	10	1,202	1,709	507	42.2%
Coal Mining	12	1,300	1,130	(170)	-13.1%
Oil and Gas Extraction	13	2,275	2,008	(267)	-11.7%
Mining of Non-Metallic Minerals, Except Fuels	14	1,022	919	(103)	-10.1%
Construction		10,218	8,690	(1,528)	-15.0%
General Building Contractors	15	2,806	2,391	(415)	-14.8%
Heavy Construction Contractors	16	2,939	2,304	(635)	-21.6%
Special Trade Contractors	17	4,472	3,994	(478)	-10.7%
Manufacturing		E 21,149	E 20,911	E (238)	E -1.1%
Food and Kindred Products	20	2,785	2,716	(69)	-2.5%
Textile Mill Products	22	"0"	"0"	"0"	"0"
Apparel and Other Textile Products	23	593	537	(56)	-9.4%
Lumber and Wood Products	24	8,235	8,358	123	1.5%
Furniture and Fixtures	25	227	216	(11)	-4.8%
Paper and Allied Products	26	857	845	(12)	-1.4%
Printing and Publishing	27	2,418	2,415	(3)	-0.1%
Chemicals and Allied Products	28	656	598	(58)	-8.8%
Petroleum Refining and Related Industries	29	861	773	(88)	-10.2%
Rubber and Miscellaneous Plastic Products	30	132	178	46	34.8%
Leather and Leather Products	31	71	48	(23)	-32.4%
Stone, Clay, Glass, and Concrete Products	32	1,042	893	(149)	-14.3%
Primary Metals Processing	33	1,210	1,177	(33)	-2.7%
Fabricated Metal Products	34	571	542	(29)	-5.1%
Machinery, Except Electrical	35	481	538	57	11.9%
Electrical and Electronic Equipment	36	165	164	(1)	-0.6%
Transportation Equipment	37	197	188	(9)	-4.6%
Instruments and Related Products	38	131	148	17	13.0%
Miscellaneous Manufacturing Industries	39	517	577	60	11.6%
Transportation and Public Utilities		16,746	16,143	(603)	-3.6%
Local and Interurban Passenger Transit	41	1,132	1,040	(92)	-8.1%
Trucking and Warehousing	42	5,568	5,314	(254)	-4.6%
Water Transportation	44	18	16	(2)	-11.1%
Transportation by Air	45	853	995	142	16.6%
Pipelines, Except Natural Gas	46	97	77	(20)	-20.6%
Transportation Services	47	507	525	18	3.6%
Communications	48	3,942	3,590	(352)	-8.9%
Electric, Gas, and Sanitary Services	49	4,625	4,582	(43)	-0.9%
Wholesale Trade		15,294	15,002	(292)	-1.9%
Durable Goods	50	8,079	7,879	(200)	-2.5%
Nondurable Goods	51	7,214	7,122	(92)	-1.3%
Retail Trade		57,241	57,770	529	0.9%
Building Materials and Hardware	52	2,758	2,667	(91)	-3.3%
General Merchandise Stores	53	5,752	6,154	402	7.0%
Food Stores	54	8,509	8,508	(1)	-0.0%
Automotive Dealers and Service Stations	55	7,730	7,754	24	0.3%
Apparel and Accessory Stores	56	2,500	2,444	(56)	-2.2%
Furniture and Home Furnishings Stores	57	2,156	2,163	7	0.3%
Eating and Drinking Places	58	21,803	21,944	141	0.6%
Miscellaneous Retail	59	6,030	6,134	104	1.7%
Finance, Insurance, and Real Estate		13,073	13,163	90	0.7%
Banking	60	4,987	4,808	(179)	-3.6%
Credit Agencies other than Banks	61	1,834	1,861	27	1.5%
Security, Commodity Brokers, and Services	62	577	604	27	4.7%
Insurance Carriers	63	1,262	1,335	73	5.8%
Insurance Agents, Brokers, and Services	64	1,754	1,726	(28)	-1.6%
Real Estate	65	2,420	2,536	116	4.8%
Combined Real Estate, Insurance, Etc.	66	96	96	0	0.0%
Holding and Other Investment Offices	67	141	193	52	36.9%
Services		59,406	62,363	2,957	5.0%
Hotels and Other Lodging Places	70	6,881	6,952	71	1.0%
Personal Services	72	2,951	2,908	(43)	-1.5%
Business Services	73	6,297	6,815	518	8.2%
Auto Repair, Services, and Garages	75	2,024	1,984	(40)	-2.0%
Miscellaneous Repair Services	76	855	956	101	11.8%
Motion Pictures	78	600	558	(42)	-7.0%
Amusement and Recreation Services	79	2,348	2,547	199	8.5%
Private Health Services	80	21,883	23,457	1,574	7.2%
Legal Services	81	1,950	2,088	138	7.1%
Private Educational Services	82	1,808	1,870	62	3.4%
Private Social Services	83	4,334	4,740	406	9.4%
Museums, Art Galleries, Etc.	84	93	104	11	11.8%
Membership Organizations Including Tribal Gov't	86	4,204	4,109	(95)	-2.3%
Private Households	88	327	355	28	8.6%
Engineering, Accounting, and Other Services	89	2,843	2,914	71	2.5%
Non-Classifiable	99	71	37	(34)	-47.9%
Government		61,729	61,439	(290)	-0.5%
State		15,589	15,306	(283)	-1.8%
Local		33,469	33,008	(461)	-1.4%
Federal		12,670	13,124	454	3.6%

*Includes only employment covered by the Unemployment Insurance Program.

**Standard Industrial Classification

***These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Table 2.7

	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987
Montana	4.3%	4.8%	4.8%	4.8%	5.2%	6.4%	6.1%	6.4%	6.2%	5.1%	6.1%	6.9%	8.5%	8.8%	7.4%	7.7%	8.1%	7.4%
Billings Region	4.2%	4.5%	4.6%	4.3%	4.5%	5.4%	4.8%	5.0%	5.0%	3.4%	4.8%	5.5%	6.1%	7.9%	7.2%	7.5%	8.2%	7.6%
Big Horn	6.0%	6.1%	6.0%	6.6%	7.7%	7.1%	5.9%	7.9%	6.6%	5.0%	6.4%	6.4%	6.1%	8.5%	8.8%	10.2%	14.5%	13.6%
Cannonville	4.9%	5.1%	6.3%	5.0%	5.0%	6.1%	5.3%	5.2%	6.1%	4.3%	4.4%	4.6%	7.4%	7.2%	7.4%	7.7%	8.1%	7.4%
Stillwater	4.8%	4.8%	4.8%	4.2%	3.7%	4.0%	4.7%	5.2%	4.5%	3.3%	3.8%	4.0%	8.5%	11.2%	8.6%	7.7%	8.1%	6.5%
Sweet Grass	1.4%	2.0%	2.4%	2.7%	2.5%	3.2%	3.5%	2.8%	2.5%	1.2%	2.1%	3.4%	4.5%	4.8%	6.0%	6.4%	7.5%	6.8%
Yellowstone	4.2%	4.1%	4.5%	4.1%	4.2%	5.3%	4.7%	4.8%	4.9%	3.2%	4.8%	5.3%	6.4%	7.8%	7.0%	7.3%	7.7%	7.2%
Bozeman Region	3.3%	3.6%	3.9%	3.9%	4.8%	6.3%	5.2%	5.3%	5.1%	4.6%	6.3%	6.1%	7.3%	7.4%	5.6%	5.7%	6.0%	6.3%
Ballwin	2.7%	2.9%	3.0%	3.4%	4.3%	6.0%	5.1%	4.8%	4.5%	4.5%	6.2%	5.5%	6.3%	6.4%	4.8%	5.0%	6.0%	5.7%
Wheatland	3.8%	3.7%	4.8%	4.0%	4.9%	9.7%	6.8%	5.4%	4.8%	3.8%	5.4%	6.5%	9.2%	11.7%	13.1%	8.9%	8.0%	8.4%
Park	4.6%	5.7%	6.4%	5.5%	6.0%	7.6%	5.4%	6.6%	5.8%	5.3%	7.1%	8.3%	10.8%	10.6%	7.5%	7.8%	9.1%	8.6%
Butte Region	3.9%	5.6%	4.4%	4.3%	4.9%	7.3%	7.8%	7.9%	7.8%	5.8%	6.7%	8.7%	10.6%	11.8%	9.8%	8.8%	9.0%	8.3%
Beaverhead	3.8%	3.8%	3.4%	3.2%	3.8%	5.0%	3.5%	4.0%	4.2%	3.4%	3.5%	4.1%	6.0%	6.5%	5.3%	6.0%	5.8%	5.4%
Ober Lodge	5.9%	5.9%	4.3%	3.8%	4.1%	6.5%	6.7%	8.6%	9.2%	7.0%	9.5%	17.0%	15.1%	17.1%	11.9%	10.8%	11.0%	9.6%
Grangeville	6.2%	9.7%	7.1%	6.5%	6.3%	10.9%	9.4%	8.9%	9.7%	7.7%	7.7%	10.9%	11.8%	11.0%	8.5%	13.1%	11.0%	8.8%
Madison	5.0%	1.5%	4.7%	4.8%	5.2%	6.8%	6.0%	5.9%	4.7%	3.0%	4.6%	4.6%	7.0%	9.6%	5.5%	4.4%	5.4%	7.4%
Powell	4.8%	4.7%	5.1%	4.9%	4.7%	6.5%	7.8%	6.7%	6.5%	5.6%	6.3%	8.3%	10.1%	7.9%	8.7%	8.0%	7.8%	7.8%
Silver Bow	3.9%	6.2%	4.6%	4.4%	5.2%	8.1%	9.3%	9.1%	8.6%	6.2%	6.8%	8.3%	11.3%	13.5%	11.8%	9.7%	10.2%	9.2%
Glasgow-Wolf Point Region	4.3%	4.8%	4.1%	4.9%	4.0%	4.8%	4.7%	6.1%	5.2%	3.9%	4.2%	4.6%	6.4%	8.2%	6.4%	7.0%	7.0%	7.1%
Danville	3.2%	2.8%	4.3%	3.2%	1.7%	1.8%	2.2%	4.3%	3.1%	5.0%	1.8%	2.1%	3.1%	4.4%	4.2%	4.2%	4.7%	4.6%
Phillips	4.4%	4.4%	4.2%	4.9%	3.5%	4.6%	4.9%	5.8%	5.2%	3.7%	4.1%	4.8%	7.4%	8.4%	6.3%	7.6%	7.5%	6.3%
Roosevelt	5.8%	6.0%	4.6%	6.5%	5.2%	5.4%	4.9%	6.0%	5.5%	4.7%	5.3%	5.8%	7.4%	9.0%	7.0%	7.8%	8.2%	8.8%
Sheridan	3.3%	3.3%	3.6%	3.9%	3.0%	3.1%	3.4%	2.8%	2.2%	3.5%	1.6%	1.3%	8.4%	6.0%	4.7%	7.0%	7.8%	4.8%
Valley	4.0%	5.0%	3.9%	4.7%	3.4%	5.9%	6.6%	8.8%	7.1%	5.4%	5.4%	6.4%	8.4%	9.7%	6.8%	7.1%	8.0%	7.1%
Glendive-Sidney Region	2.9%	3.2%	3.4%	3.5%	3.1%	3.5%	3.3%	3.8%	3.2%	3.2%	2.6%	2.8%	6.3%	9.4%	5.6%	5.7%	7.3%	6.8%
Oakwood	2.9%	3.2%	3.5%	3.9%	3.1%	3.8%	3.5%	4.3%	3.4%	2.7%	3.0%	3.0%	2.4%	10.4%	2.7%	4.9%	5.2%	9.4%
Garfield	1.4%	2.3%	1.9%	1.2%	1.3%	2.7%	2.6%	2.6%	2.0%	4.7%	3.7%	1.8%	3.4%	3.1%	2.7%	2.7%	3.2%	9.4%
McCone	1.9%	2.6%	2.6%	2.5%	2.9%	2.0%	2.1%	3.0%	3.4%	1.7%	3.0%	1.8%	3.4%	3.2%	5.1%	5.1%	3.8%	2.8%
Prairie	3.0%	4.0%	2.9%	3.1%	2.0%	2.0%	2.3%	3.0%	3.4%	2.7%	2.7%	4.6%	5.4%	4.2%	2.5%	5.7%	6.8%	5.6%
Richland	3.6%	3.3%	3.8%	3.8%	3.6%	3.9%	3.6%	3.0%	3.4%	1.6%	2.3%	2.3%	7.4%	19.6%	5.6%	6.7%	10.4%	9.1%
Wibaux	3.2%	4.3%	3.5%	4.0%	3.2%	4.4%	4.4%	5.2%	3.4%	3.0%	2.6%	4.0%	9.4%	13.2%	9.3%	8.0%	6.3%	5.4%
Great Falls Region	4.0%	4.8%	5.1%	5.4%	5.2%	5.4%	5.9%	6.2%	6.3%	5.7%	6.6%	7.2%	8.3%	8.7%	7.5%	8.0%	8.3%	7.7%
Cascade	4.1%	4.9%	5.2%	5.7%	5.3%	5.3%	6.4%	6.3%	7.3%	6.2%	7.3%	6.0%	8.3%	9.0%	7.3%	7.9%	7.9%	7.4%
Chouteau	2.1%	2.8%	3.2%	3.3%	2.4%	6.5%	3.1%	3.8%	3.2%	2.2%	2.4%	2.1%	3.4%	4.8%	4.4%	5.7%	6.4%	5.5%
Glacier	5.8%	5.2%	4.4%	5.0%	6.4%	6.4%	6.3%	8.2%	9.2%	7.8%	8.5%	12.1%	11.3%	11.4%	12.3%	12.0%	11.9%	11.9%
Pondera	5.1%	5.2%	5.6%	5.4%	4.8%	4.3%	4.3%	5.2%	4.4%	3.7%	4.2%	3.3%	5.4%	11.4%	6.7%	6.8%	7.1%	7.1%
Teton	3.6%	3.6%	5.2%	5.0%	4.0%	4.7%	4.7%	4.8%	4.8%	3.5%	3.8%	3.3%	5.3%	5.9%	4.8%	5.3%	5.9%	5.2%
Toole	4.1%	6.2%	5.7%	4.5%	4.1%	4.3%	4.7%	5.2%	4.1%	4.0%	4.0%	3.5%	6.4%	8.0%	6.6%	7.3%	9.8%	6.7%
Hayden Region	4.2%	4.4%	4.4%	4.3%	4.2%	4.8%	4.6%	5.3%	5.5%	4.7%	6.2%	6.7%	7.4%	8.1%	7.4%	7.6%	8.3%	7.4%
Blaine	5.1%	6.0%	6.9%	5.6%	3.8%	6.8%	5.8%	6.3%	8.5%	6.9%	8.6%	8.8%	9.3%	9.4%	8.8%	8.6%	10.9%	9.3%
Hill	3.9%	3.5%	3.5%	4.0%	3.2%	3.6%	4.5%	5.2%	4.7%	4.2%	5.8%	6.4%	7.4%	8.1%	7.1%	7.3%	7.4%	7.4%
Liberty	3.3%	3.9%	3.9%	3.3%	3.4%	3.2%	2.3%	3.4%	4.8%	3.2%	3.1%	3.4%	4.5%	4.0%	5.2%	5.6%	4.6%	4.3%
Helena Region	3.5%	3.9%	3.9%	4.5%	5.2%	5.4%	5.0%	5.4%	5.7%	4.9%	5.2%	6.0%	7.6%	7.6%	6.5%	6.7%	6.8%	6.3%
Broadwater	2.7%	2.7%	3.9%	2.6%	2.8%	6.6%	6.4%	5.8%	4.7%	3.9%	7.1%	7.1%	9.9%	9.7%	7.9%	8.3%	11.9%	9.6%
Jefferson	4.4%	4.4%	6.0%	6.3%	8.4%	10.0%	7.6%	7.7%	7.9%	7.4%	6.5%	7.5%	10.4%	11.2%	6.1%	6.0%	6.0%	4.7%
Lewis & Clark	3.4%	3.9%	3.7%	4.3%	4.7%	4.8%	4.6%	5.4%	5.6%	4.8%	5.0%	5.8%	7.2%	7.2%	6.5%	6.7%	6.7%	6.5%
Kalispell Region	7.3%	7.2%	7.0%	6.9%	9.0%	10.4%	9.2%	9.8%	8.5%	7.2%	9.4%	10.7%	13.7%	10.8%	9.0%	9.5%	9.9%	8.8%
Flathead	6.4%	6.4%	5.5%	5.8%	6.4%	8.1%	7.1%	8.7%	6.8%	6.0%	7.4%	10.1%	9.7%	10.5%	7.7%	8.5%	9.4%	8.1%
Lake	9.1%	9.0%	9.0%	9.2%	12.1%	14.3%	13.1%	12.8%	12.3%	10.4%	15.4%	15.0%	9.7%	13.4%	12.8%	8.2%	9.4%	7.8%
Lincoln	6.8%	5.5%	5.2%	5.0%	6.6%	8.7%	7.4%	8.5%	8.3%	7.9%	9.7%	11.5%	16.0%	12.6%	12.4%	16.6%	15.5%	12.9%
Lewistown Region	3.7%	4.2%	4.9%	4.3%	4.9%	5.1%	4.5%	5.5%	5.3%	3.6%	4.4%	4.3%	7.0%	8.0%	6.9%	7.5%	8.4%	8.7%
Perkus	3.9%	3.9%	4.4%	4.4%	4.5%	5.2%	4.9%	5.4%	4.8%	3.4%	4.8%	5.2%	7.8%	7.3%	7.0%	7.8%	9.0%	8.8%
Golden Valley	5.4%	6.3%	7.5%	5.5%	5.2%	9.3%	5.4%	4.3%	4.5%	4.2%	4.3%	3.4%	5.8%	9.4%	7.7%	7.3%	7.0%	9.1%
Mudith Basin	2.0%	3.2%	3.9%	3.1%	3.9%	5.1%	3.4%	4.1%	10.2%	8.1%	6.9%	2.8%	5.8%	7.8%	6.6%	6.7%	5.3%	5.3%
Musselshell	5.0%	5.0%	5.0%	3.3%	3.8%	5.5%	5.2%	7.8%	4.7%	2.6%	2.3%	2.9%	8.3%	9.8%	7.2%	7.4%	10.6%	10.1%
Poplar	2.9%	5.4%	5.7%	4.3%	2.2%	4.0%	1.7%	2.0%	1.9%	1.5%	3.9%	2.5%	3.9%	8.8%	6.0%	4.1%	7.0%	4.5%
Petroleum	3.2%	3.9%	6.5%	4.3%	5.0%	3.1%	3.6%	4.3%	4.5%	2.3%	3.7%	4.3%	5.2%	7.6%	6.3%	5.7%	6.4%	10.9%
Wheatland	3.2%	3.2%	2.5%	2.3%	5.5%	5.8%	4.6%	5.7%	5.7%	4.9%	4.2%	4.8%	7.4%	7.3%	7.7%	7.2%	7.7%	6.8%
Miles City Region	2.9%	3.2%	3.4%	3.3%	3.3%	3.5%	4.0%	4.9%	5.0%	3.9%	4.2%	4.8%	5.6%	7.3%	7.7%	7.2%	7.7%	6.8%
Carter	1.9%	1.9%	1.9%	2.2%	2.7%	2.9%	1.6%	3.1%	8.4%	7.8%	6.0%	1.8%	3.4%	5.6%	3.3%	2.4%	3.7%	3.6%
Custer	3.2%	3.9%	4.3%	3.3%	3.5%	4.2%	3.6%	5.0%	4.7%	3.4%	3.6%	4.9%	6.4%	6.2%	5.1%	5.0%	6.3%	5.6%
Fallon	2.8%	3.0%	3.0%	3.0%	2.6%	2.7%	2.5%	3.5%	3.5%	2.1%	2.1%	2.2%	3.8%	5.8%	4.7%	5.0%	10.6%	7.2%
Powder River	1.4%	1.9%	2.2%	2.2%	2.0%	2.5%	3.2%	2.8%	3.0%	2.8%	2.8%	2.1%	6.4%	6.2%	4.2%	2.4%	4.6%	4.6%
Rosebud	3.1%	3.0%	3.2%	3.3%	3.6%	3.3%	5.7%	6.8%	6.1%	5.0%	5.7%	7.0%	11.4%	10.4%	12.7%	11.4%	10.4%	9.6%
Treasure	3.2%	3.2%	2.5%	2.3%	5.5%	5.8%	4.6%	5.7%	4.2%	3.2%	3.5%	2.7%	5.2%	7.3%	6.9%	6.1%	4.7%	5.0%
Missoula Region	5.2%	4.8%	5.0%	5.8%	6.4%	8.1%	7.4%	7.8%	7.2%	6.6%	8.2%	9.7%	10.4%	9.3%	7.5%	8.0%	8.0%	6.8%
Mineral	6.3%	6.3%	6.7%	9.6%	11.1%	8.8%	10.4%	10.4%	8.8%	7.5%	10.2%	12.6%	22.5%	15.3%	12.8%	7.4%	13.0%	10.5%
Missoula	4.7%	4.3%	4.5%	6.0%	7.4%	6.9%	7.2%	7.2%	6.9%	6.4%	7.6%	11.1%	14.6%	8.0%	6.4%	7.2%	7.2%	6.2%
Ravalli	6.7%	6.8%	6.6%	6.2%	7.5%	10.4%	9.7%	9.7%	9.4%	7.6%	10.3%	11.1%	14.6%	13.3%	10.5%	10.3%	10.1%	8.9%

Source: Research and Analysis Bureau, Montana Department of Labor and Industry.
Regional unemployment rates computed by the Office of Research & Information Services,
Montana Department of Commerce, 1988.

Figure 2.7



Figure 2.8

UNEMPLOYMENT RATES IN MONTANA REGIONS 1987

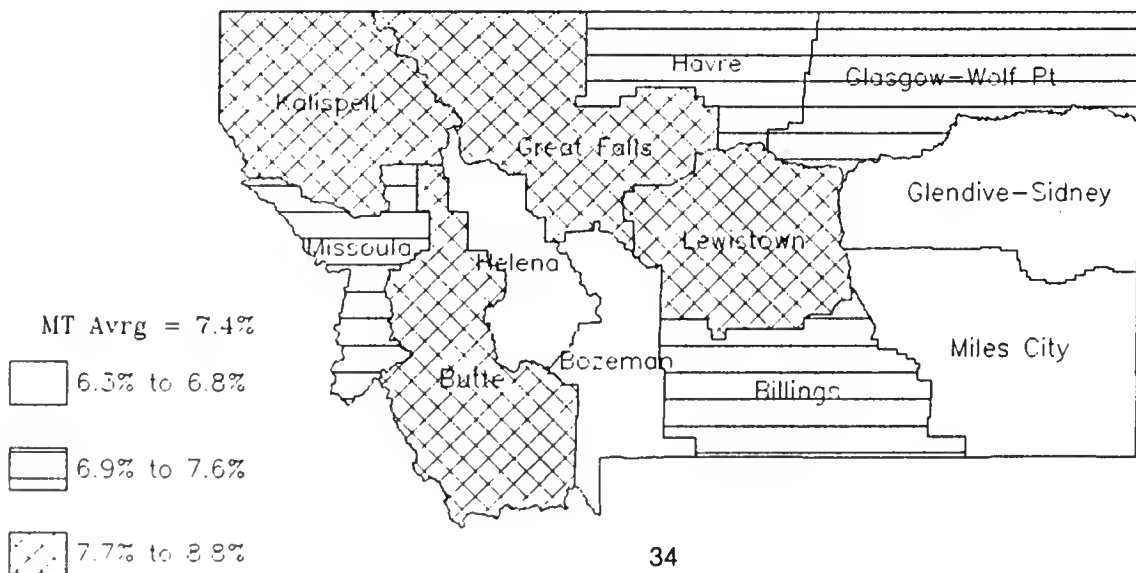


Figure 2.9

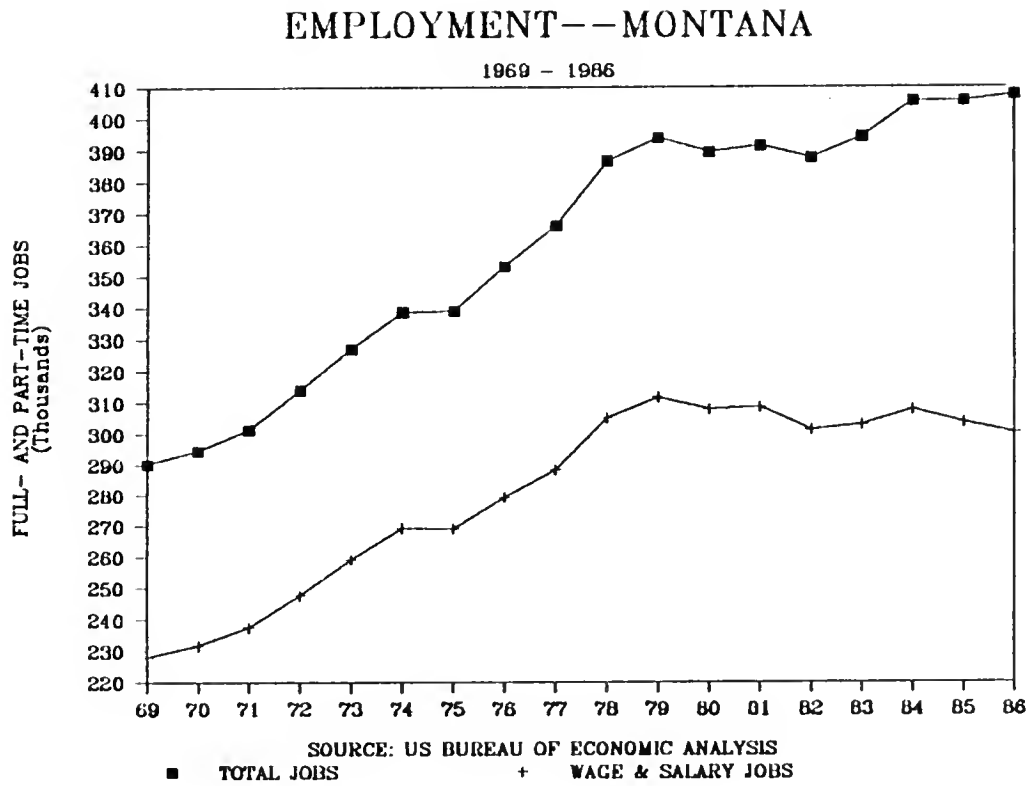


Figure 2.10

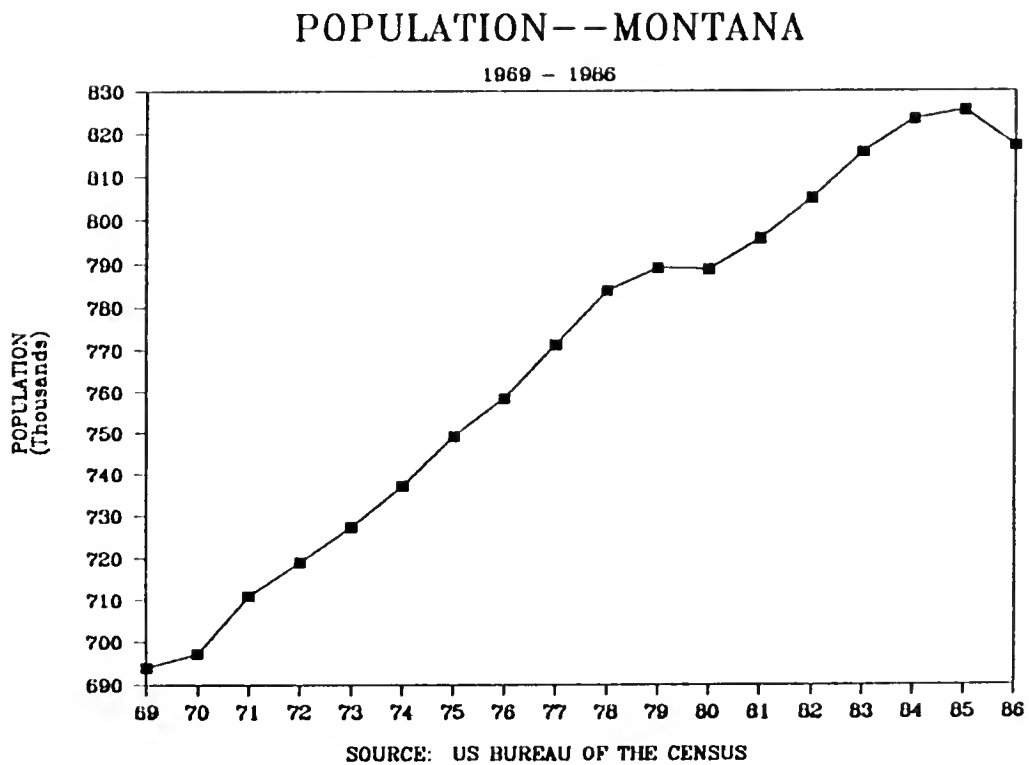


Table 2.8

POPULATION IN MONTANA AND IN REGIONS IN MONTANA:
EARLIEST CENSUSES TO 1967

	Decennial Censuses										Estimate
	1890	1900	1910	1920	1930	1940	1950	1960	1970	1980	1987
Montana	142,924	243,329	378,053	548,889	537,606	539,456	591,024	674,767	694,409	786,690	809,000
Billings Region	2,063	16,831	40,933	44,430	62,096	72,879	64,977	106,136	112,116	136,044	146,700
Big Horn	...	...	...	2,015	8,563	10,419	9,826	10,007	10,057	11,096	11,000
Carbon	...	2,332	13,962	13,279	12,371	11,865	10,241	8,317	7,080	8,099	8,300
Stillwater	...	...	...	7,630	6,253	3,694	3,414	3,328	4,632	3,398	6,200
Sweet Grass	...	3,086	4,029	4,926	3,944	3,719	3,621	3,290	2,980	3,216	3,100
Yellowstone	2,065	6,212	22,944	29,600	30,783	41,182	53,875	79,016	87,367	108,033	116,100
Bozeman Region	17,876	19,420	29,000	29,816	29,370	32,113	36,038	61,876	63,888	57,954	63,100
Gallatin	6,246	9,333	16,079	15,864	16,124	18,269	21,902	26,043	32,305	42,863	48,700
Nezperce	4,749	2,326	6,190	2,622	2,272	2,237	2,079	2,610	2,123	2,154	2,100
Park	6,881	7,341	10,731	11,330	10,974	11,609	12,057	13,213	11,261	12,933	13,300
Butte Region	48,244	82,644	92,337	101,376	93,434	90,624	84,718	87,313	80,231	73,902	67,200
Beaverhead	4,613	3,613	6,444	7,349	6,634	6,963	6,671	7,194	6,187	5,186	6,400
Deer Lodge	13,133	17,393	12,968	13,323	16,293	13,627	16,333	18,668	15,632	12,318	10,800
Granite	...	4,328	2,942	4,167	3,013	3,401	2,773	3,814	2,737	2,700	2,700
Madison	4,692	7,693	7,229	7,495	6,323	7,294	3,998	5,211	3,814	3,448	3,700
Powell	...	...	3,904	6,909	6,202	6,132	6,301	7,002	6,440	6,956	6,900
Silver Bow	23,744	47,635	56,848	60,313	58,969	53,207	48,422	46,454	41,961	38,092	33,700
Glasgow Region	...	4,313	13,630	43,047	43,493	43,256	37,887	43,051	36,084	34,333	33,000
Daniels	...	...	...	...	3,333	6,363	3,946	3,733	3,083	2,833	2,600
Phillips	...	...	...	9,311	8,208	7,892	6,334	6,027	5,346	5,367	3,400
Rosevelt	...	...	...	10,347	10,672	9,806	9,380	11,731	10,363	10,467	11,200
Sheridan	...	...	...	13,847	9,869	7,816	6,676	6,458	3,779	3,814	3,300
Valley	...	6,353	13,630	11,342	11,181	13,181	11,353	17,080	11,471	10,230	8,600
Glendive Region	2,056	2,443	12,725	32,027	33,244	29,837	29,172	32,136	23,996	31,718	29,600
Dawson	2,056	2,443	12,725	9,239	9,881	8,618	9,092	12,314	11,269	11,805	10,500
Garfield	...	...	...	3,368	4,292	2,641	3,172	1,961	1,796	1,656	1,600
McCone	...	...	...	4,767	6,798	3,790	3,256	3,321	2,875	2,702	2,500
Prairie	...	...	...	3,664	3,941	2,610	2,377	2,318	1,732	1,836	1,600
Richland	...	...	...	8,989	9,633	10,209	10,366	10,304	8,837	12,463	12,100
Wibaux	...	...	...	...	2,767	2,161	1,987	1,698	1,463	1,476	1,300
Great Falls Region	13,498	41,823	55,370	69,600	74,826	78,756	90,137	113,183	117,626	116,198	112,900
Cascade	8,793	29,777	28,833	38,836	41,146	41,999	53,027	73,418	81,804	80,696	78,100
Chouteau	6,761	10,966	17,191	11,051	8,633	7,316	6,974	7,348	6,473	6,092	5,800
Glacier	...	...	...	4,178	5,297	9,036	9,643	11,563	10,783	10,620	11,200
Pondera	...	...	...	3,741	6,964	6,716	6,392	7,653	6,611	6,731	6,600
Teton	...	3,080	9,346	3,870	6,068	6,822	7,232	7,293	6,116	6,491	6,100
Travis	...	...	...	3,724	6,716	6,769	6,867	7,804	5,839	5,359	5,200
Haure Region	...	...	...	25,631	24,979	25,079	24,961	29,368	26,444	27,313	27,000
Blaine	...	...	...	9,057	9,006	9,366	8,316	8,091	6,727	6,999	6,900
Hill	...	...	...	15,958	13,773	13,304	16,285	18,433	17,358	17,983	17,800
Liberty	...	...	...	2,616	2,198	2,209	2,180	2,624	2,339	2,329	2,300
Helena Region	23,171	27,142	30,943	27,102	25,095	30,246	31,476	33,107	41,043	53,333	58,800
Broadwater	...	2,641	3,491	3,239	3,738	3,431	2,922	2,804	2,326	3,267	3,700
Jefferson	6,026	3,330	3,601	3,203	4,133	6,464	6,014	4,297	5,238	7,029	8,300
Lewis & Clark	19,143	19,171	21,833	18,660	16,224	23,131	24,340	28,006	33,281	43,039	46,800
Kaliapell Region	...	9,375	26,136	34,405	41,322	32,349	61,006	63,486	79,061	97,449	107,000
Flathead	...	9,375	18,783	21,705	18,208	24,371	31,495	32,963	39,660	51,966	58,200
Lake	...	...	...	...	9,341	13,490	13,833	13,104	14,443	19,056	21,000
Lincoln	...	...	3,636	7,797	7,089	7,962	8,693	12,337	18,063	17,732	19,000
Sanders	...	...	3,713	4,903	5,692	6,926	6,963	6,860	7,093	8,673	8,800
Lewistown Region	3,316	6,937	17,383	43,993	36,933	29,368	28,173	27,114	25,167	26,190	23,200
Fergus	3,316	6,937	17,383	28,344	16,331	16,040	14,013	14,018	12,611	13,076	12,300
Golden Valley	...	...	...	...	2,126	1,407	1,337	1,203	931	1,026	1,100
Judith Basin	...	...	...	...	3,338	3,453	3,200	3,089	2,667	2,644	2,500
Musselshell	...	...	...	12,030	7,242	3,717	3,608	4,888	3,734	4,428	4,500
Petroleum	...	...	...	...	2,043	1,063	1,026	894	675	611	600
Wheatland	...	...	...	3,619	3,731	3,386	3,187	3,026	2,339	2,339	2,200
Missoula City Region	3,308	7,691	22,108	34,063	32,843	28,356	29,734	29,754	27,148	32,071	33,400
Carter	...	...	...	3,972	6,136	3,388	2,790	2,493	1,956	1,799	1,700
Custer	3,308	7,891	14,123	12,194	11,362	10,422	12,461	13,227	12,176	13,109	12,700
Fallon	...	...	...	4,548	4,568	3,719	3,640	3,997	4,090	3,763	3,500
Powder River	...	...	...	3,337	3,909	3,159	2,693	2,483	2,862	2,320	2,300
Rosebud	...	...	7,982	...	7,347	6,477	6,370	6,187	5,637	9,899	12,300
Treasure	...	...	...	1,990	1,661	1,498	1,402	1,343	1,069	981	1,000
Missoula Region	16,427	21,786	23,362	36,666	33,723	64,151	50,673	60,041	79,630	102,134	107,100
Mineral	...	...	...	2,327	1,628	2,133	8,081	3,037	2,958	3,673	3,500
Missoula	16,427	13,964	23,996	24,041	21,782	29,038	33,493	64,663	38,263	78,816	78,400
Spokane	...	7,323	11,666	10,090	10,313	12,978	13,181	12,341	14,409	22,493	23,200

... Not Applicable

Note: In 1890 the sum of counties is not the state total; the difference is Indian reservations. In 1900 the Crow Reservation is not included in county data.

Source: U.S. Bureau of the Census. Compiled by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Table 2.9

TOTAL PERSONAL INCOME IN MONTANA BY REGION AND COUNTY^a
(Thousands of 1987 dollars)

REGION	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986	1987 Estimate
Montana	14,867,194	46,488,253	59,823,343	59,713,950	59,926,465	59,701,034	59,761,929	59,863,265	59,758,980	510,120,952	510,048,000
Billings Region	836,456	1,097,914	1,862,143	1,859,332	1,887,774	1,905,800	1,929,641	1,972,854	1,955,255	1,971,015	1,956,000
Big Horn	52,678	77,850	117,923	127,215	150,571	116,285	110,317	113,555	111,417	124,778	
Carbon	47,992	63,067	90,012	93,776	94,980	91,944	89,180	88,974	90,359	94,574	
Stillwater	36,057	46,328	66,466	69,783	70,797	69,511	71,396	73,557	70,576	73,705	
Sweet Grass	18,794	27,776	42,820	40,963	40,755	37,902	38,584	39,674	39,150	42,834	
Yellowstone	680,935	882,892	1,344,924	1,527,795	1,550,674	1,590,154	1,620,165	1,657,095	1,643,153	1,635,124	
Bozeman Region	286,130	361,540	665,698	659,600	679,128	681,681	704,038	733,860	742,162	759,885	752,000
Gallatin	179,664	248,202	474,198	478,270	492,505	500,563	523,657	550,263	559,436	566,663	
Meagher	19,053	18,517	27,007	23,805	24,870	23,507	22,793	21,351	19,261	25,044	
Park	87,413	94,822	164,493	157,525	161,752	157,611	157,587	162,247	163,466	168,178	
Butte Region	625,416	674,172	889,760	845,600	874,673	840,734	834,105	812,057	802,394	827,035	824,000
Beaverhead	55,466	68,435	97,287	90,198	95,090	92,950	91,838	91,142	90,081	99,231	
Deer Lodge	108,911	118,465	138,262	123,650	117,894	109,670	111,153	111,872	109,931	109,538	
Granite	21,913	20,152	31,816	29,936	29,848	27,503	29,757	29,200	28,107	29,443	
Madison	30,719	39,400	66,266	60,349	62,401	55,932	56,131	58,274	59,695	45,630	
Powell	50,253	53,667	75,713	71,809	72,628	72,421	75,239	75,479	74,741	76,518	
Silver Bow	358,156	374,055	480,416	469,679	496,811	482,478	471,968	448,091	439,838	446,076	
Glasgow-Wolf Point Region	235,175	340,202	377,458	386,047	439,487	399,350	368,707	365,597	351,291	414,721	407,000
Daniels	20,407	34,882	33,967	35,548	40,790	40,508	31,940	29,494	24,232	40,939	
Phillips	34,648	43,384	55,059	56,818	61,858	53,764	50,539	52,485	47,741	81,892	
Roosevelt	50,401	89,532	102,761	109,089	116,437	112,758	112,158	111,034	110,207	119,189	
Sheridan	36,694	59,109	63,867	64,799	83,845	78,136	70,442	69,154	66,706	78,308	
Valley	93,025	113,295	121,804	119,794	136,537	114,183	103,629	103,430	98,405	114,393	
Glendive-Sidney Region	170,238	277,155	380,608	417,727	474,127	437,733	393,421	388,555	365,250	383,087	362,000
Dawson	69,129	105,825	153,279	161,885	175,948	170,063	153,808	148,486	138,942	137,710	
Garfield	10,167	24,673	21,301	20,232	25,090	20,148	17,713	15,862	14,485	23,399	
McCone	13,474	27,946	29,024	33,445	36,367	32,990	27,058	27,100	24,373	33,092	
Prairie	12,671	14,646	19,855	21,533	21,014	17,882	16,994	17,865	16,527	19,778	
Richland	33,457	89,916	141,314	163,719	196,914	180,299	163,231	163,911	157,893	154,296	
Wibaux	11,340	14,148	15,634	16,912	18,795	16,351	14,618	15,330	13,050	14,812	
Great Falls Region	902,025	1,199,785	1,548,417	1,518,020	1,537,083	1,496,167	1,495,823	1,487,450	1,450,063	1,534,802	1,520,000
Cascade	609,753	837,141	1,119,886	1,075,526	1,060,146	1,051,234	1,068,154	1,090,540	1,070,466	1,081,160	
Chouteau	45,118	79,774	67,472	67,624	91,324	81,965	76,925	66,425	64,113	66,062	
Glacier	66,446	88,278	135,232	139,793	131,837	129,220	124,277	120,117	116,012	127,354	
Pondera	53,697	68,109	74,506	77,955	85,224	80,788	76,949	71,308	65,074	81,744	
Teton	52,809	64,515	73,049	75,789	64,690	76,556	74,229	70,262	67,284	82,453	
Toole	54,200	41,948	78,273	81,333	43,663	76,404	75,245	68,999	67,113	73,785	
Havre Region	219,122	246,563	325,932	325,294	353,225	327,178	322,628	302,725	289,233	340,155	334,000
Blaine	45,617	49,519	69,279	65,379	72,151	64,497	63,253	62,264	59,615	72,187	
Hill	144,724	166,907	226,508	226,938	242,077	227,675	222,992	213,102	202,640	227,524	
Liberty	28,780	50,538	50,145	32,977	38,997	35,006	36,343	27,359	26,977	40,444	
Helena Region	285,242	418,515	706,262	709,296	716,726	722,491	732,126	743,740	760,712	769,973	785,000
Broadwater	17,459	19,650	37,477	34,267	32,601	50,794	32,263	32,043	31,243	38,299	
Jefferson	25,913	40,059	85,922	87,202	88,412	90,016	95,059	98,166	100,640	105,368	
Lewis & Clark	241,871	358,806	582,862	547,427	595,713	601,681	604,804	613,531	628,828	626,507	
Kalispell Region	480,838	689,941	1,135,365	1,088,855	1,077,124	1,046,769	1,110,956	1,160,645	1,162,918	1,178,512	1,190,000
Flathead	254,983	367,321	675,835	650,335	639,455	620,296	657,919	700,739	704,509	701,784	
Lake	71,489	101,776	185,227	183,096	179,729	177,603	187,791	194,936	201,469	213,326	
Lincoln	110,047	168,014	188,607	170,721	177,585	170,117	183,796	179,781	178,496	182,462	
Sanders	44,319	52,650	85,696	84,703	80,555	78,753	81,451	85,189	78,644	60,940	
Lewistown Region	179,180	233,311	297,700	288,570	297,398	269,444	265,321	260,588	251,507	283,118	271,000
Fergus	95,922	123,916	166,661	160,298	161,694	145,682	145,224	140,808	135,592	150,017	
Golden Valley	7,673	9,015	10,949	10,850	12,058	11,147	10,156	11,236	11,114	14,341	
Judith Basin	24,751	29,671	28,145	27,141	27,272	24,199	25,787	26,471	24,456	29,477	
Musselshell	26,334	37,331	56,127	58,199	61,210	57,485	55,079	52,362	50,681	52,558	
Petroleum	5,346	5,643	5,925	4,495	6,224	4,527	3,627	3,582	3,709	6,501	
Wheatland	19,153	27,756	29,893	27,609	26,960	26,605	25,447	26,530	25,774	50,424	
Miles City Region	189,942	283,267	416,337	426,494	438,079	443,453	432,802	414,417	395,594	408,117	395,000
Carter	12,934	23,460	25,732	20,987	18,462	13,287	13,120	15,621	14,549	20,709	
Custer	94,590	128,509	181,143	185,311	175,808	168,826	170,638	174,986	173,725	171,253	
Fallon	22,058	37,007	54,441	59,566	56,827	53,020	48,274	49,179	46,017	45,971	
Powder River	17,311	29,184	38,518	33,550	33,970	30,314	27,865	26,448	24,808	29,920	
Rosebud	34,714	51,015	103,594	111,022	141,833	165,641	160,418	137,010	124,584	126,192	
Treasure	8,335	14,092	14,907	15,458	15,759	12,365	12,487	11,173	11,911	14,071	
Missoula Region	457,430	665,906	1,217,862	1,188,895	1,151,059	1,150,235	1,172,358	1,220,375	1,232,801	1,250,531	1,231,000
Mineral	16,101	25,083	36,888	34,259	34,525	31,719	36,078	36,685	35,743	34,359	
Missoula	359,258	527,916	950,248	925,955	886,221	872,566	898,863	937,886	945,017	957,082	
Ravalli	82,070	112,907	230,727	228,703	230,293	225,949	237,417	246,004	252,041	259,090	

^a NOTE: State totals are based on the latest available county data (April, 1988). Revised statewide data (August, 1988) is used in other chapters.

Source: U.S. Bureau of Economic Analysis (1959-1986 data) and Bureau of Business and Economic Research, University of Montana (1987 data).

Regional data computed by the Office of Research and Information Services, Montana Department of Commerce, 1988. The implicit price deflator for personal consumption expenditures was used to convert the original data to 1987 dollars. 1987 estimates are preliminary.

Table 2.10

Change in Total Personal Income by Region and County
(in constant dollars)

REGION	1959-1969	Average Annual Change	1969-1979	Average Annual Change	1979-1986	Average Annual Change
Montana	35.3%	3.3%	51.4%	5.1%	3.0%	0.3%
Billings Region	31.3%	3.1%	64.6%	7.0%	5.8%	0.6%
Big Horn	47.8%	4.8%	51.5%	5.1%	5.8%	0.6%
Carbon	31.4%	3.1%	42.7%	4.3%	5.1%	0.5%
Stillwater	28.5%	2.8%	43.5%	4.3%	10.9%	1.1%
Sweet Grass	47.8%	4.8%	54.2%	5.4%	0.0%	0.0%
Yellowstone	29.7%	3.0%	75.0%	7.5%	5.8%	0.6%
Bozeman Region	26.4%	2.6%	84.1%	8.4%	14.1%	1.4%
Gallatin	58.1%	5.8%	91.1%	9.1%	19.5%	1.9%
Hoagher	-2.6%	-0.3%	45.9%	4.6%	-7.3%	-0.7%
Park	8.5%	0.6%	75.5%	7.5%	2.2%	0.2%
Butte Region	7.8%	0.6%	32.0%	3.2%	-7.0%	-0.7%
Beaverhead	23.4%	2.3%	42.2%	4.2%	2.0%	0.2%
Deer Lodge	8.8%	0.9%	16.7%	1.7%	-20.3%	-2.0%
Granite	-8.0%	-0.8%	57.9%	5.8%	-7.5%	-0.7%
Madison	28.3%	2.8%	68.2%	6.8%	-0.7%	-0.1%
Powell	6.8%	0.7%	41.1%	4.1%	1.1%	0.1%
Silver Bow	4.4%	0.4%	28.4%	2.8%	-7.1%	-0.7%
Glasgow-Wolf Point Region	44.7%	4.5%	11.0%	1.1%	4.9%	1.0%
Daniels	70.9%	7.1%	-2.6%	-0.3%	20.5%	2.1%
Phillips	25.2%	2.5%	26.9%	2.7%	12.4%	1.2%
Roosevelt	77.6%	7.8%	14.8%	1.5%	16.0%	1.6%
Sheridan	61.1%	6.1%	8.0%	0.8%	22.6%	2.3%
Valley	21.8%	2.2%	7.5%	0.8%	-6.1%	-0.6%
Glendive-Sidney Region	62.8%	6.3%	37.3%	3.7%	0.7%	0.1%
Dawson	53.1%	5.3%	44.8%	4.5%	-10.2%	-1.0%
Garfield	142.7%	14.3%	-15.7%	-1.4%	4.9%	1.0%
McCone	107.4%	10.7%	3.9%	0.4%	14.0%	1.4%
Prairie	15.6%	1.6%	35.6%	3.6%	-0.4%	-0.0%
Richland	68.2%	6.8%	57.4%	5.7%	4.0%	0.9%
Wibaux	24.8%	2.5%	10.3%	1.1%	-5.3%	-0.5%
Great Falls Region	33.0%	3.3%	24.1%	2.9%	-0.9%	-0.1%
Cascade	37.3%	3.7%	35.8%	3.4%	-5.5%	-0.5%
Chouteau	22.5%	2.3%	-15.4%	-1.5%	27.6%	2.8%
Glacier	32.9%	3.3%	55.2%	5.3%	-5.7%	-0.6%
Pondera	26.8%	2.7%	4.4%	0.9%	4.8%	1.0%
Teton	22.2%	2.2%	15.2%	1.3%	12.9%	1.3%
Toole	14.3%	1.4%	26.4%	2.6%	-3.2%	-0.3%
Havre Region	12.5%	1.3%	32.2%	3.2%	4.4%	0.4%
Blaine	8.1%	0.8%	40.5%	4.0%	4.2%	0.4%
Hill	15.3%	1.5%	35.7%	3.6%	0.4%	0.0%
Liberty	5.4%	0.5%	-0.6%	-0.1%	34.2%	3.4%
Helena Region	46.7%	4.7%	68.8%	6.9%	9.0%	0.9%
Broadwater	12.6%	1.3%	90.7%	9.1%	2.2%	0.2%
Jefferson	54.6%	5.5%	114.5%	11.4%	22.6%	2.3%
Lewis & Clark	48.5%	4.8%	62.4%	6.2%	7.5%	0.7%
Kalispell Region	43.5%	4.3%	64.6%	6.5%	5.8%	0.4%
Flethead	44.1%	4.4%	85.9%	8.4%	5.8%	0.4%
Lake	42.4%	4.2%	82.0%	8.2%	15.2%	1.5%
Lincoln	52.7%	5.3%	12.3%	1.2%	-5.3%	-0.5%
Sanders	18.8%	1.9%	62.8%	6.3%	-5.5%	-0.6%
Lewistown Region	50.2%	5.0%	27.6%	2.8%	-4.9%	-0.5%
Fergus	29.2%	2.9%	34.5%	3.4%	-10.0%	-1.0%
Golden Valley	17.5%	1.7%	21.5%	2.1%	51.0%	5.1%
Judith Basin	19.9%	2.0%	-5.1%	-0.5%	4.7%	0.3%
Musselshell	41.8%	4.2%	50.4%	5.0%	-6.4%	-0.6%
Petroleum	5.5%	0.6%	5.0%	0.5%	6.4%	0.6%
Wheatland	44.8%	4.5%	7.8%	0.8%	1.8%	0.2%
Miles City Region	49.1%	4.9%	47.0%	4.7%	-2.0%	-0.2%
Carter	81.4%	8.1%	1.2%	0.1%	-12.7%	-1.3%
Custer	35.9%	3.6%	41.0%	4.1%	-5.5%	-0.5%
Fallon	67.8%	6.8%	47.1%	4.7%	-15.6%	-1.6%
Powder River	68.6%	6.9%	32.0%	3.2%	-22.5%	-2.2%
Rosebud	47.0%	4.7%	103.1%	10.3%	21.8%	2.2%
Treasure	64.1%	6.9%	5.8%	0.6%	-5.6%	-0.6%
Missoula Region	45.6%	4.6%	82.8%	8.3%	2.7%	0.3%
Mineral	55.8%	5.6%	47.1%	4.7%	-6.9%	-0.7%
Missoula	46.9%	4.7%	80.0%	8.0%	0.7%	0.1%
Pavelli	57.6%	5.8%	104.4%	10.4%	12.5%	1.2%

Source: U.S. Bureau of Economic Analysis. Statistics computed by the Office of Research and Information Services,
Montana Department of Commerce, 1988.

Figure 2.11

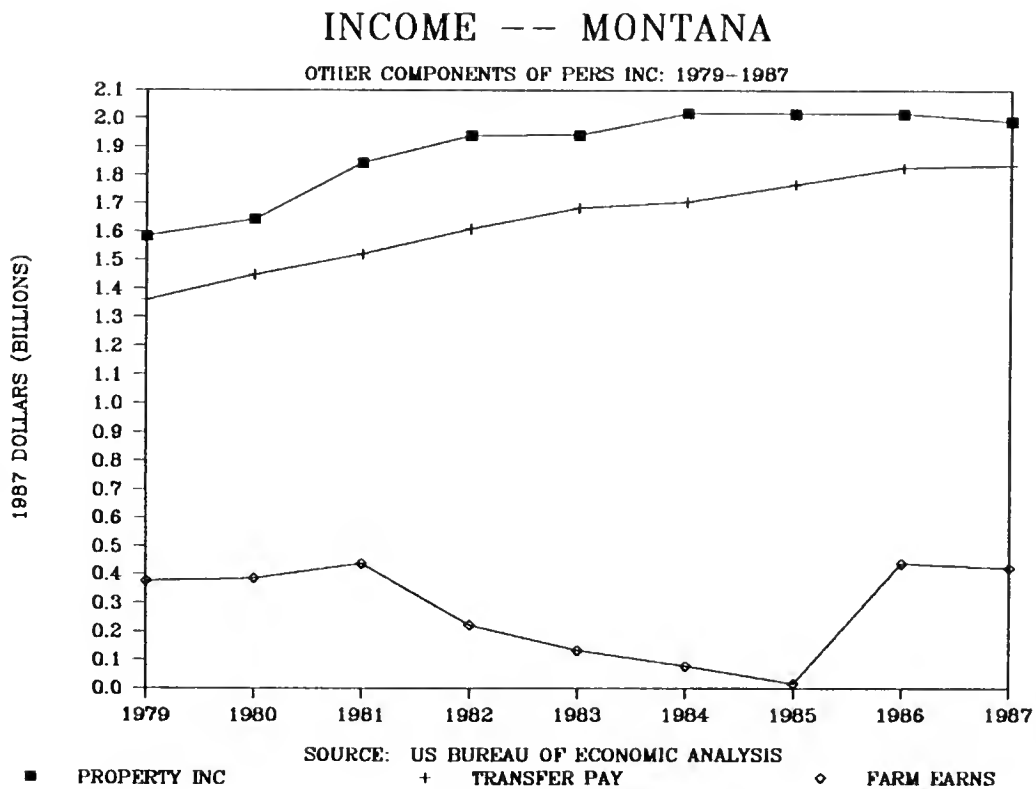
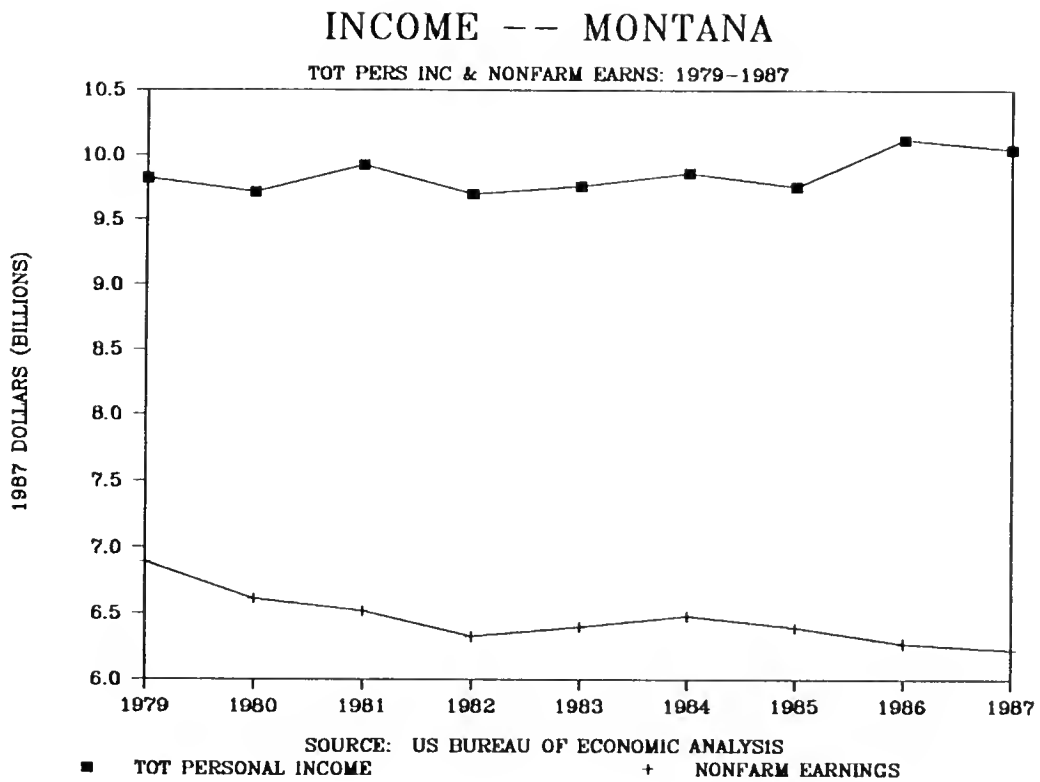
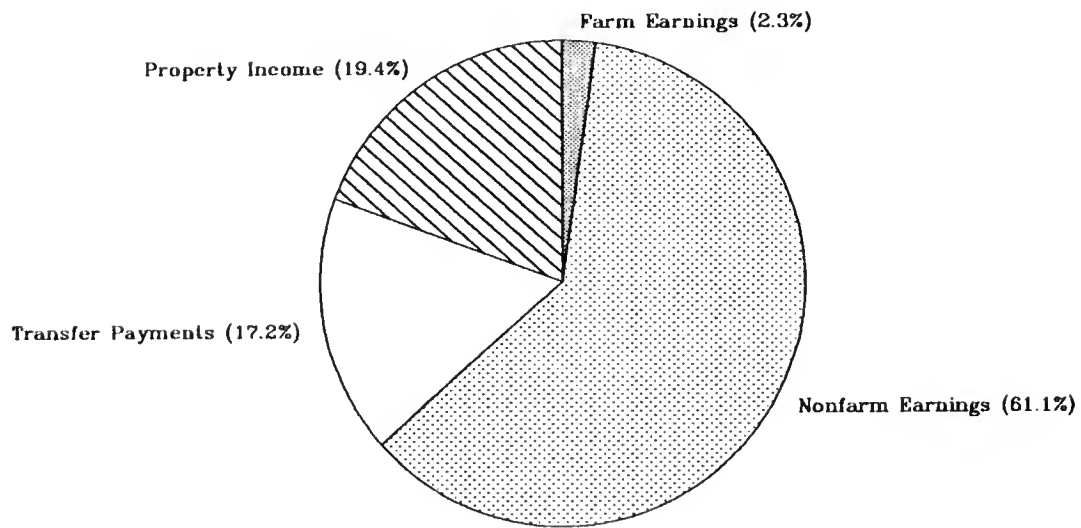


Figure 2.12

COMPOSITION OF MONTANA PERSONAL INCOME

1984 - 1987 AVERAGE



COMPOSITION OF MONTANA PERSONAL INCOME

1969 - 1971 AVERAGE

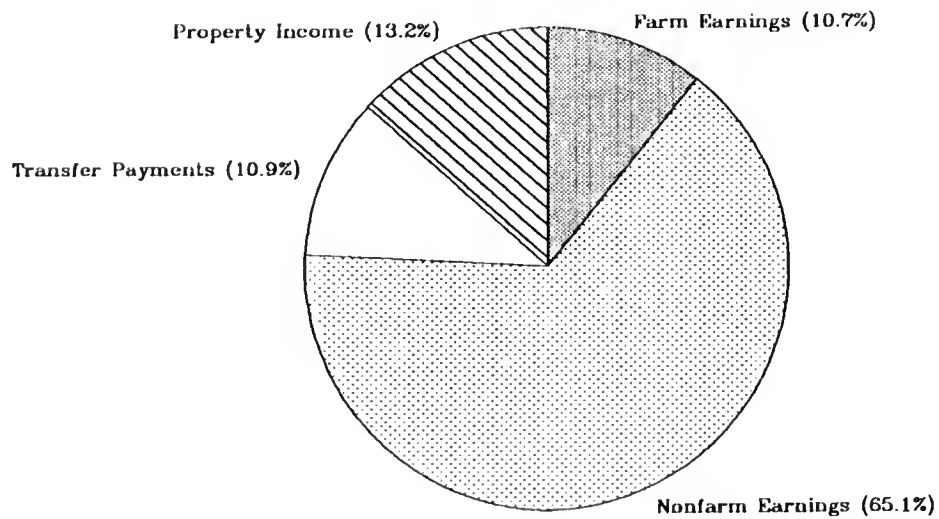


Table 2.11

NONFARM EARNINGS IN MONTANA BY REGION AND COUNTY*										
(Thousands of 1987 dollars)										
	1959	1969	1979	1980	1981	1982	1983	1984	1985	1987 Estimate
Montana	15,330,003	14,425,024	16,689,771	16,610,614	16,517,361	16,324,934	16,400,344	16,480,642	16,391,959	16,271,302
Billings Region	600,981	779,621	1,408,352	1,373,423	1,335,282	1,334,778	1,357,554	1,384,823	1,368,480	1,331,437
Big Horn	27,785	57,465	102,681	122,177	94,449	85,076	82,638	86,159	85,467	82,206
Carbon	20,833	23,728	32,557	31,677	31,555	28,845	30,371	30,739	32,515	31,589
Stillwater	13,637	15,707	24,517	25,410	25,464	22,995	23,747	25,160	24,993	26,077
Sweet Grass	8,091	10,669	15,266	13,720	13,373	13,444	13,246	14,436	14,398	13,853
Yellowstone	530,635	691,853	1,233,310	1,180,439	1,170,241	1,144,418	1,207,553	1,230,328	1,210,884	1,177,713
Bozeman Region	179,376	243,247	451,499	432,038	432,941	440,950	449,455	475,158	478,826	473,267
Gallatin	116,744	177,580	332,027	319,487	323,066	336,861	346,553	367,657	374,793	369,622
Meagher	9,760	8,429	11,420	10,582	9,891	9,475	9,886	9,447	9,445	9,336
Park	52,872	57,238	108,053	102,168	99,985	94,614	95,014	98,054	96,587	94,309
Butte Region	450,271	484,127	590,370	546,297	553,219	517,339	509,521	481,687	476,454	478,267
Beaverhead	27,278	35,457	52,452	52,020	50,090	50,906	52,954	53,469	53,330	55,092
Deer Lodge	95,556	96,104	96,673	78,970	66,319	55,901	58,449	59,202	59,716	56,689
Granite	12,649	11,399	11,655	11,107	11,018	10,542	12,673	13,200	11,767	11,301
Madison	11,761	18,251	26,295	24,480	25,550	25,611	24,992	25,222	25,777	26,984
Powell	28,362	36,007	45,276	41,579	40,403	43,618	44,536	45,451	47,136	44,347
Silver Bow	274,665	286,908	357,820	340,142	359,840	330,742	315,916	285,143	278,728	283,653
Glasgow-Wolf Point Region	145,065	175,619	232,501	226,944	255,412	220,488	213,713	218,885	210,788	205,861
Daniels	9,812	10,420	14,690	13,638	14,263	15,222	14,015	13,782	13,128	12,955
Phillips	14,499	17,919	29,357	30,888	28,800	27,342	28,895	35,106	28,588	31,251
Roosevelt	51,477	51,577	72,088	68,786	69,551	72,768	73,843	74,565	74,500	71,548
Sheridan	18,073	23,985	38,703	41,785	48,871	40,410	35,601	34,818	33,726	31,729
Valley	71,004	69,718	77,663	71,648	93,926	84,746	81,559	82,615	60,846	58,578
Glendive-Sidney Region	110,032	152,775	253,861	275,791	310,684	282,506	241,024	247,586	230,754	204,465
Dawson	54,330	73,006	112,582	115,868	126,469	119,617	105,485	101,594	94,476	85,670
Garfield	3,481	5,104	5,717	5,433	5,174	5,405	5,586	5,672	5,565	5,569
McCone	9,394	10,120	13,428	12,451	11,542	12,542	11,797	11,446	11,121	11,035
Prairie	5,254	4,882	7,546	9,920	5,952	5,918	5,912	5,874	5,755	5,844
Richland	51,399	54,270	108,346	125,551	155,522	133,258	106,480	117,586	108,508	91,219
Wibaux	6,175	5,392	8,242	6,568	8,024	5,787	5,364	5,413	5,328	5,127
Great Falls Region	833,912	821,846	1,107,929	1,038,969	992,306	949,782	952,793	963,413	958,002	923,752
Cascade	488,187	662,913	848,149	781,992	749,466	728,129	735,594	743,388	724,993	716,411
Chouteau	17,007	17,086	25,096	23,596	24,400	22,458	22,023	20,877	20,641	21,174
Glacier	50,553	61,414	110,881	112,482	97,812	89,427	86,325	89,171	84,175	80,400
Pondera	27,589	23,740	37,800	36,047	35,379	34,420	35,842	36,219	37,236	35,841
Teton	19,886	24,530	34,845	33,833	35,522	35,000	31,048	32,123	29,587	29,554
Toole	30,711	32,166	51,157	51,059	49,728	41,949	41,960	41,654	41,510	40,572
Havre Region	113,747	155,155	217,333	204,055	193,859	185,893	182,314	183,488	177,876	174,759
Blaine	20,200	21,892	34,097	30,747	29,590	28,498	29,558	30,447	31,670	30,247
Hill	85,881	104,542	170,917	161,442	152,779	146,168	141,629	141,486	134,925	133,447
Liberty	7,666	8,721	12,318	11,866	11,490	11,227	11,127	11,353	11,082	11,064
Helena Region	206,102	315,872	517,132	510,689	508,387	508,241	519,824	527,995	543,181	532,604
Broadwater	7,129	9,231	21,073	16,460	15,305	14,584	15,708	15,634	15,130	14,732
Jefferson	15,054	24,584	27,630	27,370	27,416	35,556	36,317	39,899	42,225	41,000
Lewis & Clark	183,919	282,058	468,429	466,838	465,666	458,101	467,801	472,462	485,825	476,872
Kalispell Region	347,719	530,822	789,440	716,627	690,504	640,635	496,257	736,441	729,944	724,497
Fleethad	182,225	276,482	492,867	451,420	428,256	395,914	425,597	465,965	464,501	455,227
Lake	37,567	54,856	90,443	82,967	82,576	80,529	86,971	89,586	96,479	97,587
Lincoln	97,398	164,280	150,871	128,777	134,053	120,966	156,789	131,164	127,817	130,631
Sanders	30,550	35,203	55,259	53,463	47,618	43,226	44,900	49,726	41,147	41,251
Lewistown Region	86,943	107,419	145,420	138,678	154,453	123,920	123,051	119,232	119,805	117,218
Fergus	50,453	61,231	89,674	84,827	80,036	73,109	74,853	71,249	71,953	70,749
Golden Valley	2,305	2,113	2,436	2,367	2,957	2,536	2,653	3,577	3,573	3,976
Judith Basin	6,545	7,374	9,662	8,845	8,695	8,853	8,379	8,500	8,444	8,592
Musselshell	14,945	20,473	29,459	30,009	30,687	27,680	25,330	25,764	23,182	21,363
Petroleum	2,179	2,259	1,623	1,453	1,454	1,409	1,520	1,626	1,688	1,707
Wheatland	10,518	13,967	12,566	11,377	10,624	10,334	10,116	10,736	10,966	10,851
Miles City Region	114,624	155,913	260,622	280,451	309,792	358,120	342,282	293,387	269,854	256,320
Carter	4,262	5,856	6,560	4,305	4,022	4,005	5,969	4,020	5,663	5,502
Custer	68,048	83,988	115,235	115,033	101,585	97,806	99,844	102,113	100,392	96,244
Fallon	15,372	22,461	38,810	42,129	38,051	36,415	32,122	32,612	30,564	27,750
Powder River	5,783	10,732	15,532	15,425	16,059	17,599	15,184	13,417	13,314	12,418
Rosebud	18,510	29,158	80,088	97,427	144,023	196,281	185,204	155,182	115,860	110,196
Treasure	2,849	3,518	4,396	4,133	4,052	4,014	3,979	4,043	4,060	4,209
Missoula Region	341,230	324,809	915,313	866,832	800,522	762,281	812,554	848,326	848,196	848,657
Mineral	11,955	19,343	28,389	23,153	23,399	18,703	24,721	25,583	23,099	21,769
Missoula	287,710	441,095	782,001	743,831	681,518	652,876	690,229	720,383	719,948	719,161
Reavell	41,585	64,172	106,923	99,647	95,606	90,702	97,604	102,561	105,149	107,727

* NOTE: State totals are based on the latest available county data (April, 1988). Revised statewide data (August, 1988) is used in other chapters.

Source: U.S. Bureau of Economic Analysis (1959-1986 data) and Bureau of Business and Economic Research, University of Montana (1987 data).

Regional data computed by the Office of Research and Information Services, Montana Department of Commerce, 1988. The implicit price deflator for personal consumption expenditures was used to convert the original data to 1987 dollars. 1987 estimates are preliminary.

Table 2.12

PROPERTY INCOME IN MONTANA BY REGION AND COUNTY*
(Thousands of 1987 dollars)

REGION	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986	1987 Estimate
Montana	\$688,209	\$895,387	\$1,585,002	\$1,644,646	\$1,844,273	\$1,938,987	\$1,942,005	\$2,018,399	\$2,017,157	\$2,017,079	\$1,990,000
Billings Region	127,863	156,976	205,761	297,006	344,478	360,529	360,572	380,182	381,480	383,947	387,000
Big Horn	6,856	8,164	12,720	13,373	13,339	15,351	14,029	15,508	15,435	15,417	
Carbon	8,996	10,784	20,984	22,727	25,756	26,754	26,249	27,593	27,354	27,255	
Stillwater	7,481	9,505	14,782	15,754	17,694	19,275	20,804	22,100	21,091	21,000	
Sweet Grass	4,014	5,768	11,320	11,663	13,033	13,195	14,346	14,439	14,219	14,146	
Yellowstone	102,696	122,756	225,954	233,489	272,657	285,956	285,145	300,541	303,380	306,130	
Bozeman Region	53,435	63,568	122,836	128,053	145,942	149,492	156,806	160,926	165,089	165,261	167,000
Gallatin	33,501	42,956	85,909	90,825	104,797	105,007	112,424	116,410	116,692	116,979	
Meagher	3,970	3,378	4,800	5,084	5,686	6,749	6,589	6,444	6,534	6,507	
Park	15,964	17,234	32,127	32,344	35,458	37,736	37,792	38,072	41,862	41,775	
Butte Region	86,732	95,854	134,713	139,080	155,277	166,407	161,394	166,027	161,947	160,289	154,000
Beaverhead	12,438	12,752	21,269	21,053	22,364	23,753	24,171	23,333	22,468	22,405	
Deer Lodge	11,025	12,518	14,591	15,833	18,178	19,372	19,145	20,935	19,489	19,519	
Granite	2,212	2,836	5,859	5,847	6,513	7,114	7,245	4,832	7,033	7,025	
Madison	6,278	7,645	17,916	17,715	19,019	18,043	18,119	18,417	18,465	18,391	
Powell	6,663	7,220	12,868	14,329	16,479	17,060	16,566	16,349	16,071	16,022	
Silver Bow	48,114	52,883	62,210	64,302	72,724	81,065	76,148	80,161	78,420	78,926	
Glasgow-Wolf Point Region	30,386	46,811	82,710	87,045	96,290	102,285	107,354	108,936	107,194	106,575	106,000
Daniels	3,578	5,821	9,725	10,243	11,227	11,209	11,475	11,950	11,707	11,596	
Phillips	5,172	7,523	13,973	14,650	15,980	16,401	16,918	16,763	16,009	15,901	
Roosevelt	7,118	11,728	18,194	19,341	21,789	22,894	26,180	25,643	25,937	25,823	
Sheridan	6,230	9,423	16,938	18,051	20,350	22,081	24,821	26,038	25,899	25,767	
Valley	8,287	12,116	23,880	24,760	26,943	29,699	27,980	28,542	27,642	27,488	
Glendive-Sidney Region	22,013	34,524	65,664	68,755	77,139	83,777	84,961	86,270	84,366	84,155	83,000
Dawson	7,951	12,466	22,818	23,843	26,765	30,247	27,955	28,259	27,290	27,273	
Garfield	1,365	2,256	4,169	4,239	4,892	5,264	5,158	5,176	5,254	5,220	
McCone	2,172	3,340	7,948	7,490	7,764	7,828	7,690	7,881	7,547	7,499	
Prairie	1,491	2,238	4,227	4,786	5,439	5,667	5,825	5,847	5,697	5,632	
Richland	7,140	12,035	23,399	25,015	28,611	30,896	33,977	34,535	34,538	34,507	
Wibaux	1,894	2,189	3,104	3,382	3,869	3,875	4,358	4,573	4,040	4,024	
Great Falls Region	115,767	158,288	227,134	236,653	267,019	280,665	282,755	295,176	294,313	294,066	289,000
Cascade	76,495	102,992	139,821	145,199	164,621	172,709	172,525	183,818	186,210	186,467	
Chouteau	10,392	13,926	23,264	23,894	28,605	26,985	27,371	26,564	25,845	25,713	
Glacier	6,156	8,703	14,355	14,143	15,468	18,294	18,615	19,376	19,661	19,666	
Pondera	6,102	12,241	17,690	18,996	21,480	22,037	22,416	23,671	21,841	21,739	
Teton	8,039	11,804	18,825	19,815	22,119	22,694	23,825	23,397	23,305	23,151	
Toole	6,582	8,621	13,379	14,605	16,727	17,945	17,982	18,349	17,452	17,330	
Havre Region	29,472	38,441	58,633	61,783	70,297	72,975	72,116	75,257	74,647	73,802	72,000
Blaine	5,487	7,741	13,577	13,952	15,284	16,382	16,277	16,554	16,302	16,244	
Hill	19,749	25,456	36,992	39,194	45,280	46,744	46,319	49,193	48,361	47,643	
Liberty	4,236	5,243	8,064	8,637	9,733	9,849	9,520	9,510	9,984	9,913	
Helena Region	62,343	54,326	96,913	100,443	113,768	122,747	118,396	124,280	124,900	125,259	125,000
Broadwater	2,305	3,396	7,457	7,474	8,124	8,406	7,988	8,201	9,085	9,052	
Jefferson	2,704	3,865	11,051	11,212	12,395	13,122	14,315	16,141	16,776	16,807	
Lewis & Clark	57,334	47,066	78,404	81,758	93,249	101,260	96,092	99,938	99,039	99,399	
Kalispell Region	63,920	84,256	182,719	189,068	210,559	218,485	225,239	232,625	233,912	234,115	233,000
Flathead	37,437	47,086	108,855	112,705	125,675	128,773	133,537	139,161	139,241	139,285	
Lake	13,286	18,234	41,405	43,292	48,466	51,319	54,107	55,460	55,073	54,945	
Lincoln	7,225	11,743	18,996	18,902	20,528	21,992	21,822	21,854	22,559	22,809	
Sanders	5,971	7,193	13,463	14,169	15,890	16,401	15,773	16,151	17,038	17,077	
Lewistown Region	27,337	36,418	68,219	70,240	77,539	79,556	82,194	84,210	83,791	83,387	81,000
Fergus	15,184	20,904	37,838	39,151	43,194	43,907	44,986	46,052	45,056	44,803	
Golden Valley	1,043	1,623	3,561	3,548	3,431	3,682	3,824	4,170	3,988	3,961	
Judith Basin	3,600	4,270	7,152	7,265	7,694	7,864	8,802	9,420	9,868	9,821	
Musselshell	4,458	5,637	11,846	12,251	13,593	14,457	14,860	14,093	14,314	14,265	
Petroleum	233	402	941	1,132	1,353	1,134	1,239	1,239	1,274	1,267	
Wheatland	2,819	3,582	6,881	7,094	8,073	8,514	8,483	9,236	9,311	9,269	
Miles City Region	23,438	35,710	68,103	71,438	79,206	83,189	80,452	80,771	78,785	78,600	75,000
Carter	1,317	2,542	4,879	5,062	5,505	5,499	5,853	6,865	6,817	6,765	
Custer	13,297	18,674	34,791	35,708	38,993	41,046	39,611	38,821	37,129	36,958	
Fallon	2,009	3,847	6,921	7,755	9,105	9,380	9,348	9,267	9,201	9,183	
Powder River	1,620	3,081	6,181	6,436	6,778	6,915	6,842	6,643	6,583	6,557	
Rosebud	4,199	6,214	12,228	13,341	15,457	16,752	15,184	16,090	15,672	15,783	
Treasure	995	1,352	3,102	3,137	3,368	3,597	3,615	3,285	3,384	3,354	
Missoula Region	65,525	90,415	191,599	195,083	206,760	218,837	209,787	223,738	228,732	227,623	221,000
Mineral	1,417	2,049	3,727	3,676	3,980	4,206	3,871	4,003	4,589	4,673	
Missoula	48,473	67,433	132,506	134,861	140,702	150,727	141,103	152,702	154,554	155,567	
Spokane	15,635	20,933	55,366	56,546	62,078	63,904	64,614	67,033	67,588	67,382	

* NOTE: State totals are based on the latest available county data (April, 1988). Revised statewide data (August, 1988) is used in other chapters.

Source: U.S. Bureau of Economic Analysis (1959-1986 data) and Bureau of Business and Economic Research, University of Montana (1987 data).

Regional data computed by the Office of Research and Information Services, Montana Department of Commerce, 1988. The implicit price deflator for personal consumption expenditures was used to convert the original data to 1987 dollars. 1987 estimates are preliminary.

Table 2.13

TRANSFER PAYMENTS IN MONTANA BY REGION AND COUNTY*											
(Thousands of 1987 dollars)											
REGION	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986 Estimate	
Montana	\$430,048	\$688,349	\$1,360,824	\$1,449,040	\$1,521,385	\$1,610,453	\$1,685,185	\$1,706,221	\$1,767,320	\$1,827,710	\$1,856,000
Billings Region	62,473	101,549	210,682	226,900	237,997	252,701	267,812	274,627	284,337	294,642	296,000
Big Horn	5,076	7,794	15,420	16,591	17,733	18,113	18,645	19,551	20,542	21,433	
Carbon	6,745	8,971	16,825	18,015	18,343	18,778	19,798	19,981	20,367	20,986	
Stillwater	3,230	5,386	10,758	11,258	12,011	12,675	13,884	13,994	14,441	14,991	
Sweet Grass	2,035	3,090	5,593	5,884	6,358	6,551	6,723	6,986	7,323	7,455	
Yellowstone	45,388	76,308	162,286	175,174	183,553	196,583	208,761	214,114	221,664	229,779	
Bozeman Region	25,424	39,100	84,442	91,480	98,711	105,796	112,488	113,095	119,087	124,239	125,000
Gallatin	15,209	25,424	59,791	65,341	67,944	71,478	76,539	76,904	81,156	84,813	
Meagher	1,698	2,081	3,530	3,655	4,295	4,920	5,317	4,784	4,646	4,835	
Park	8,517	11,594	21,120	22,483	26,468	29,398	30,633	31,406	33,284	34,591	
Butte Region	66,585	92,015	162,416	169,271	178,138	184,688	194,645	193,725	196,775	204,054	205,000
Beaverhead	5,039	7,604	14,204	14,897	15,150	16,226	17,344	17,463	18,798	19,933	
Deer Lodge	11,125	16,334	28,643	30,404	32,765	32,711	34,514	34,166	34,703	35,587	
Granite	1,913	2,978	5,157	5,456	5,938	6,318	6,482	6,435	6,715	6,848	
Madison	3,382	5,036	9,685	9,589	10,669	10,637	11,654	12,134	12,599	12,790	
Powell	5,875	7,476	13,458	14,151	14,685	15,071	16,159	16,005	16,555	16,772	
Silver Bow	39,250	52,589	91,268	94,773	98,931	102,927	108,491	107,520	107,605	112,125	
Glasgow-Wolf Point Region	25,561	38,225	59,160	62,415	65,912	69,207	72,668	72,432	74,256	78,428	77,000
Daniels	2,164	4,255	5,645	5,866	6,332	6,562	6,828	6,330	6,382	6,482	
Phillips	3,840	5,957	8,830	9,114	9,814	10,900	11,027	11,640	11,971	12,302	
Roosevelt	6,895	11,198	17,062	18,080	19,129	20,283	21,412	21,667	22,235	22,976	
Sheridan	4,192	5,220	8,813	9,430	9,803	10,700	11,518	11,497	11,715	12,033	
Valley	8,472	11,615	18,811	19,904	20,834	20,763	21,862	21,298	21,954	22,633	
Glandive-Sidney Region	15,727	25,512	44,954	47,960	49,052	54,468	59,985	59,107	59,538	61,514	62,000
Dawson	5,376	9,924	17,795	18,656	18,444	20,714	22,922	22,771	21,704	22,343	
Garfield	918	1,519	2,439	2,637	2,643	2,715	2,975	2,986	3,374	3,507	
McCone	1,324	1,921	3,204	3,225	3,804	4,211	4,447	4,394	4,482	4,617	
Prairie	1,188	2,180	3,209	3,599	3,989	4,017	4,148	4,153	4,297	4,297	
Richland	5,934	8,355	15,838	16,680	17,520	20,002	22,162	21,332	22,620	23,439	
Wibaux	988	1,615	2,473	2,965	2,653	2,927	3,260	3,273	3,205	3,511	
Great Falls Region	83,679	114,968	214,445	223,469	233,252	244,253	256,663	260,373	270,677	278,985	280,000
Cascade	41,499	78,955	153,371	159,564	165,597	172,629	182,192	183,507	190,655	196,645	
Chouteau	3,899	6,301	9,745	10,625	11,115	12,078	12,112	12,212	12,296	12,635	
Glacier	8,345	12,399	20,706	21,360	22,104	22,656	24,412	25,604	28,373	27,266	
Pondera	3,829	5,966	11,033	11,077	12,185	13,140	15,276	13,793	14,366	14,884	
Teton	3,862	5,786	10,802	11,264	12,355	12,939	13,249	13,606	14,237	14,386	
Toole	4,244	5,561	8,987	9,559	9,918	10,811	11,422	11,652	12,353	12,971	
Havre Region	15,590	25,780	46,897	49,100	50,772	55,090	57,016	57,482	58,826	61,008	61,000
Blaine	5,194	7,686	12,806	13,411	13,544	14,279	14,509	15,211	15,742	16,265	
Hill	9,364	16,404	30,477	32,011	33,598	36,641	37,921	37,811	38,680	39,973	
Liberty	1,032	1,690	3,614	3,677	3,630	4,169	4,566	4,660	4,604	4,750	
Helena Region	24,596	46,415	100,571	106,707	113,003	119,740	124,257	126,052	133,266	138,024	139,000
Broadwater	1,543	2,527	4,728	5,293	6,076	6,673	6,734	6,969	7,604	7,977	
Jefferson	2,864	5,412	11,903	12,661	13,865	14,681	14,958	15,450	15,817	16,394	
Lewis & Clark	20,189	38,473	85,940	88,753	93,062	98,387	102,566	103,633	109,846	113,633	
Kalispell Region	52,081	76,871	171,215	184,376	193,667	212,732	218,166	221,812	231,966	238,541	240,000
Flathead	29,002	40,747	90,760	97,245	102,075	111,215	115,203	115,621	120,301	123,934	
Lake	9,434	16,243	35,974	38,320	40,995	44,111	46,008	48,023	50,416	52,054	
Lincoln	7,658	11,670	27,380	31,084	31,863	35,971	35,034	35,988	37,592	38,564	
Sanders	5,966	8,211	16,901	17,728	18,733	21,435	21,921	22,380	23,457	24,020	
Lewistown Region	17,973	27,080	48,005	51,029	52,690	53,787	54,514	54,966	55,626	56,880	57,000
Fergus	9,434	14,862	26,227	27,987	28,791	29,040	29,338	29,644	30,202	31,111	
Golden Valley	718	1,061	1,597	1,707	1,803	1,929	2,050	2,145	2,191	2,232	
Judith Basin	1,630	2,542	4,280	4,679	4,920	5,043	4,994	5,017	5,277	5,285	
Musselshell	3,685	5,010	10,205	10,531	10,663	11,045	11,415	11,393	11,283	11,551	
Petroleum	459	595	628	651	700	690	759	678	750	767	
Wheatland	2,027	3,212	5,067	5,473	5,815	6,041	5,959	5,891	5,925	5,914	
Miles City Region	18,049	27,173	47,864	51,090	53,562	56,046	60,161	62,295	62,898	64,653	65,000
Carter	1,206	1,880	2,540	2,712	2,866	2,922	3,165	3,022	3,168	3,268	
Custer	7,710	13,448	23,454	24,441	25,902	26,810	28,643	29,469	30,342	31,452	
Fallon	1,765	2,950	5,341	5,758	5,490	6,029	4,158	6,123	6,243	6,578	
Powder River	895	1,667	2,897	2,945	3,084	3,272	3,560	3,707	3,720	3,862	
Rosebud	3,837	8,447	12,074	13,302	14,249	15,414	16,910	18,208	17,568	17,611	
Treasure	636	781	1,339	1,492	1,530	1,599	1,725	1,765	1,857	1,862	
Missoula Region	44,311	73,664	169,970	185,246	194,628	201,945	206,412	210,259	220,269	228,702	230,000
Mineral	1,990	3,081	6,562	7,260	7,433	9,131	8,366	8,122	8,342	8,649	
Missoula	32,439	53,268	122,200	132,555	137,741	141,014	144,701	145,918	152,887	159,629	
Ravalli	9,882	17,316	41,408	45,431	49,455	51,801	53,745	56,219	58,840	60,423	

* NOTE: State totals are based on the latest available county data (April, 1988). Revised statewide data (August, 1988) is used in other chapters.

Source: U.S. Bureau of Economic Analysis (1959-1986 data) and Bureau of Business and Economic Research, University of Montana (1987 data).

Regional data computed by the Office of Research and Information Services, Montana Department of Commerce, 1988. The implicit price deflator for personal consumption expenditures was used to convert the original data to 1987 dollars. 1987 estimates are preliminary.

Table 2.14

FARM EARNINGS IN MONTANA BY REGION AND COUNTY*										
(Thousands of 1987 dollars)										
	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986 Estimate
Montana	1334,960	1722,112	1377,285	1386,654	1438,717	1225,369	1133,897	177,928	116,838	1438,410
Billings Region	66,180	100,902	46,820	50,629	37,304	20,345	13,247	16,297	10,071	49,338
Big Horn	14,899	27,375	17,690	19,000	17,086	8,090	5,191	4,517	1,031	16,662
Carbon	12,458	16,065	6,479	8,147	6,751	3,302	589	868	1,390	6,915
Stillwater	10,585	14,328	6,083	6,623	5,041	2,678	2,126	2,800	1,247	4,715
Sweet Grass	4,847	8,359	8,487	7,250	5,756	2,624	2,508	2,393	1,854	6,419
Yellowstone	23,412	34,373	8,081	9,607	2,669	3,451	4,833	5,919	4,549	14,626
Bozeman Region	32,816	29,487	29,922	29,856	25,717	10,827	12,019	13,821	12,754	31,348
Gallatin	18,010	12,617	12,897	19,005	13,146	6,947	8,860	12,642	12,258	20,939
Meagher	4,044	5,445	7,978	5,314	5,697	3,123	1,821	1,503	(391)	5,377
Park	10,862	11,425	9,047	5,536	4,873	735	1,338	1,676	887	5,252
Butte Region	37,308	31,872	40,552	26,338	26,803	10,646	6,140	7,876	6,978	25,652
Beaverhead	11,924	13,949	15,561	9,169	13,799	8,946	4,550	4,229	2,808	9,650
Deer Lodge	1,273	2,078	1,927	1,788	870	629	526	780	361	1,449
Granite	5,453	2,783	5,309	3,809	2,943	1,040	657	857	957	5,008
Madison	9,101	8,960	11,771	7,846	6,626	1,464	1,050	2,289	2,956	7,805
Powell	8,813	5,329	5,298	5,026	2,759	(926)	(1,116)	(831)	(1,023)	3,089
Silver Bow	764	772	646	700	(193)	(505)	475	552	739	671
Glasgow-Wolf Point Region	38,821	91,383	20,425	27,180	55,436	25,467	(8,964)	(17,138)	(24,341)	65,628
Daniels	5,213	15,109	5,150	8,938	10,159	8,807	812	(1,507)	(1,695)	11,231
Phillips	11,610	12,606	4,494	4,467	9,441	1,114	(4,270)	(5,683)	(6,626)	5,604
Roosevelt	5,302	18,266	816	6,814	9,689	2,296	(4,074)	(5,312)	(6,810)	4,679
Sheridan	8,672	21,670	3,646	1,206	11,805	10,169	2,401	368	(1,168)	12,214
Valley	8,025	23,734	6,559	7,755	14,363	3,081	(3,653)	(5,204)	(8,042)	9,898
Glenridge-Sidney Region	27,814	72,569	26,152	31,956	50,613	26,322	10,147	8,734	4,492	45,841
Gowson	3,581	14,436	3,345	6,272	9,411	4,552	1,895	1,174	461	7,540
Garfield	4,617	16,112	9,010	7,860	12,462	6,666	3,968	2,128	420	9,281
McCone	1,332	13,090	4,947	10,400	13,406	8,925	3,373	4,044	1,897	10,852
Prairie	4,869	5,316	4,409	2,850	4,625	1,324	398	1,509	419	3,678
Richland	11,099	18,488	801	5,115	8,537	4,303	999	(L)	1,954	12,742
Wibaux	2,316	5,127	1,641	1,461	2,372	552	(487)	(L)	(859)	1,787
Great Falls Region	109,130	147,580	50,176	66,070	91,771	65,605	48,007	13,798	(7,185)	86,203
Cascade	19,978	29,954	13,975	15,743	9,244	7,022	9,349	11,669	1,365	16,805
Chouteau	34,400	40,977	7,037	7,602	28,747	18,834	13,174	3,723	2,657	24,410
Glacier	5,172	9,009	5,827	13,015	13,574	13,980	8,575	234	(1,075)	12,284
Pondera	14,577	26,820	5,275	8,471	13,566	8,507	3,596	(4,100)	(9,564)	8,506
Teton	20,925	22,699	8,122	10,621	16,895	8,425	8,337	1,805	211	15,768
Toole	14,077	18,120	9,942	10,617	11,747	8,816	6,976	467	(757)	8,649
Havre Region	64,981	56,686	17,297	23,596	51,595	26,415	23,800	(608)	(8,575)	44,182
Blaine	15,166	12,693	8,189	8,189	12,844	4,378	1,912	(1,209)	(4,523)	9,107
Hill	53,582	27,100	5,875	9,469	25,507	12,732	11,134	(700)	(5,054)	20,423
Liberty	16,416	14,891	5,252	7,959	13,443	9,505	10,733	1,301	1,004	14,652
Helena Region	18,602	17,797	13,180	13,544	7,637	2,643	2,967	2,955	786	11,992
Broadwater	6,589	4,273	3,266	3,726	1,897	0	859	91	(1,820)	5,401
Jefferson	3,123	2,813	4,624	5,958	2,371	517	273	476	50	2,557
Lewis & Clark	8,890	10,711	5,290	5,880	3,369	2,126	1,856	2,388	2,556	4,053
Kalispell Region	28,551	24,075	24,625	29,086	14,555	7,152	4,656	7,594	7,728	22,989
Fleethad	11,151	9,108	5,821	9,452	5,909	4,764	4,897	3,502	7,141	10,472
Lake	11,902	10,289	12,170	13,725	4,354	(955)	(2,796)	(1,249)	(2,189)	7,517
Lincoln	1,891	1,325	1,415	1,149	777	775	522	787	685	1,250
Sanders	3,607	3,555	5,217	4,780	5,514	2,569	2,053	2,355	2,090	3,771
Lewistown Region	50,597	67,736	37,442	29,265	33,641	15,199	6,541	2,927	(5,949)	28,962
Fergus	22,864	50,277	19,526	14,704	15,716	5,325	1,848	(1,158)	(6,178)	8,850
Golden Valley	3,829	4,205	2,057	2,095	2,818	1,599	412	490	364	3,325
Judith Basin	13,241	15,360	5,049	4,507	3,754	1,154	1,841	1,755	(886)	4,510
Musselshell	3,652	7,103	1,985	2,378	3,270	1,366	495	402	(199)	3,943
Petroleum	2,560	2,950	2,708	1,225	2,696	1,024	76	(169)	188	2,752
Wheatland	4,451	7,843	6,517	4,559	5,386	2,731	1,869	1,586	761	5,623
Miles City Region	40,967	75,180	59,764	48,965	38,388	12,641	10,070	14,894	14,625	35,258
Carter	6,425	15,349	9,945	7,105	4,358	(940)	(1,620)	140	(842)	5,417
Custer	7,481	17,199	11,409	12,955	9,707	5,259	5,129	8,045	9,906	10,898
Fallon	3,651	9,758	4,725	5,441	5,095	2,370	1,607	2,198	1,170	3,575
Powder River	9,125	13,765	13,261	7,885	7,610	2,138	1,751	1,420	861	6,695
Rosebud	10,019	12,696	15,095	9,570	8,256	2,072	1,345	1,426	1,665	4,515
Treasure	5,870	8,415	5,352	6,029	5,405	1,742	1,879	1,267	1,864	4,140
Missoula Region	19,094	8,846	10,951	10,170	5,058	2,109	3,268	4,977	5,455	12,817
Mineral	906	122	599	465	388	378	481	494	634	728
Missoula	6,400	2,475	4,540	4,080	1,950	1,058	1,978	2,326	2,049	4,359
Ravalli	11,787	6,249	5,811	5,625	2,720	674	809	2,157	2,771	7,729

* NOTE: State totals are based on the latest available county data (April, 1988). Revised statewide data (August, 1988) is used in other chapters.

(L) Less than \$50,000 in current dollars

Source: U.S. Bureau of Economic Analysis (1959-1986 data) and Bureau of Business and Economic Research, University of Montana (1987 data).

Regional data computed by the Office of Research and Information Services, Montana Department of Commerce, 1988. The implicit price deflator for personal consumption expenditures was used to convert the original data to 1987 dollars. 1987 estimates are preliminary.

Table 2.15

PER CAPITA PERSONAL INCOME IN MONTANA BY REGION AND COUNTY*
(in 1987 dollars)

REGION	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986	1987 Estimate
Montana	\$7,275	\$9,350	\$12,448	\$12,314	\$12,474	\$12,050	\$11,966	\$11,978	\$11,823	\$12,385	\$12,400
Billings Region	7,951	9,820	13,658	13,605	13,587	13,387	13,229	13,265	13,021	13,256	13,300
Big Horn	5,321	7,744	10,787	11,406	11,499	10,196	9,729	9,856	9,607	11,130	
Carbon	5,853	8,756	10,713	11,553	11,620	11,057	10,457	10,269	10,355	11,099	
Stillwater	6,556	9,834	11,504	12,434	12,517	11,995	12,054	12,148	11,500	12,237	
Sweet Grass	5,695	9,225	13,200	12,694	12,470	11,505	11,735	11,815	11,831	13,373	
Yellowstone	8,696	10,169	14,306	14,072	14,034	14,004	13,873	13,911	13,636	13,831	
Bozeman Region	6,895	7,928	11,623	11,318	11,449	11,254	11,458	11,752	11,702	11,840	11,900
Gallatin	6,964	7,762	11,288	11,107	11,259	11,115	11,478	11,768	11,715	11,552	
Nezperce	7,328	8,528	11,742	11,016	11,577	10,517	9,818	9,531	8,936	11,819	
Park	6,673	8,280	12,687	12,063	12,083	11,851	11,870	12,066	12,096	12,950	
Butte Region	7,205	8,317	11,771	11,464	11,978	11,692	11,662	11,561	11,528	12,199	12,300
Beaverhead	7,812	8,435	12,285	10,981	11,449	10,879	10,593	10,745	10,651	11,754	
Deer Lodge	5,887	7,435	10,685	9,956	9,833	9,441	9,729	9,990	9,951	10,827	
Granite	7,304	7,281	11,705	11,067	10,982	10,319	10,960	10,775	10,269	10,909	
Madison	5,907	7,814	11,981	10,977	10,968	9,712	9,805	9,948	10,358	11,557	
Powell	7,283	8,001	10,543	10,358	10,555	10,729	10,704	10,828	10,781	11,109	
Silver Bow	7,769	8,802	12,225	12,367	13,270	13,184	13,101	12,728	12,897	13,152	
Glasgow-Wolf Point Region	5,273	9,097	10,905	11,211	12,642	11,259	10,294	10,245	9,863	12,284	12,300
Daniels	5,518	11,096	11,898	12,561	14,552	14,498	11,514	10,628	10,270	15,782	
Phillips	5,775	7,957	10,532	10,573	11,470	9,920	8,964	9,206	8,402	11,278	
Roosevelt	4,345	8,511	10,041	10,348	10,768	9,999	9,693	9,602	9,423	10,511	
Sheridan	5,735	10,105	11,835	11,840	14,718	13,018	11,784	11,741	11,467	14,367	
Valley	5,504	9,114	11,262	11,728	13,578	11,447	10,564	10,602	10,171	12,881	
Glendive-Sidney Region	5,357	9,451	12,071	13,003	14,078	12,288	11,175	11,389	11,015	12,356	12,200
Dawson	5,666	9,304	12,897	13,607	14,374	13,350	12,181	12,219	11,808	12,647	
Garfield	5,083	13,594	12,263	12,196	15,078	12,050	10,475	9,127	8,571	14,408	
McCone	4,083	9,575	10,706	12,364	13,414	11,884	9,850	10,285	9,472	12,922	
Prairie	5,509	8,117	10,584	11,691	11,298	9,417	8,907	9,646	9,171	11,957	
Richland	5,140	9,062	12,046	13,068	14,453	12,067	11,112	11,501	11,358	11,848	
Wibaux	6,670	9,496	9,933	11,319	12,049	10,362	9,480	10,310	9,268	11,367	
Great Falls Region	7,899	10,205	12,887	13,066	13,267	12,863	12,622	12,367	12,369	13,495	13,500
Cascade	8,376	10,312	13,257	13,340	13,222	13,113	13,096	13,396	13,251	13,775	
Chouteau	8,920	12,154	11,001	11,111	15,138	13,341	12,318	10,788	10,582	14,604	
Glacier	5,778	8,111	13,029	13,102	12,199	11,678	11,064	10,512	10,262	11,445	
Pondera	7,065	10,149	10,841	11,582	12,686	11,765	11,070	10,200	9,485	12,249	
Teton	7,335	10,388	10,807	11,667	13,024	11,951	11,156	10,588	10,347	13,392	
Toole	8,949	10,297	14,144	14,599	14,919	13,482	12,859	11,977	11,733	14,050	
Havre Region	7,550	9,225	11,787	11,883	12,815	11,742	11,544	10,737	10,395	12,527	12,400
Blaine	5,702	7,182	9,571	9,350	10,386	9,519	9,172	8,794	8,348	10,257	
Hill	7,823	9,551	12,549	12,578	13,271	12,289	11,984	11,489	11,128	12,787	
Liberty	11,069	12,717	12,757	14,099	16,413	14,483	14,881	10,662	10,909	17,410	
Helena Region	8,173	10,329	13,324	13,243	13,191	13,136	13,059	13,084	13,207	13,223	13,400
Broadwater	6,235	7,700	11,458	10,531	10,200	9,332	9,487	9,572	8,889	10,728	
Jefferson	6,026	7,768	11,872	12,327	12,217	12,349	12,339	12,526	12,545	13,033	
Lewis & Clark	8,700	10,936	13,715	13,598	13,549	13,548	13,653	13,495	13,651	13,448	
Kalispell Region	7,409	8,851	11,705	11,159	11,002	10,590	11,067	11,192	10,985	11,009	11,100
Flathead	7,798	9,441	13,121	12,501	12,262	11,841	12,358	12,658	12,298	12,036	
Lake	5,499	7,094	9,966	9,592	9,367	9,162	9,518	9,594	9,728	10,216	
Lincoln	8,875	9,554	10,520	9,606	9,953	9,421	10,042	9,609	9,504	9,812	
Sanders	6,517	7,424	9,545	9,745	9,216	8,729	9,025	9,256	8,620	9,119	
Lewistown Region	8,461	9,916	12,263	11,918	12,263	11,089	10,866	10,687	10,354	11,955	11,700
Fergus	8,901	9,706	12,798	12,276	12,479	11,219	11,311	10,973	10,533	11,953	
Golden Valley	6,394	9,400	10,949	10,443	11,128	10,350	9,456	10,150	9,871	13,097	
Judith Basin	7,984	10,942	10,506	10,169	9,902	9,098	9,477	9,771	9,177	11,555	
Musselshell	5,486	9,782	12,295	13,046	13,356	12,365	11,525	10,945	10,636	11,505	
Petroleum	5,940	8,109	8,850	6,807	9,180	6,516	5,431	5,147	5,645	10,265	
Wheatland	6,584	10,755	12,775	11,860	13,175	11,755	10,894	11,482	11,537	13,698	
Missoula City Region	6,439	9,993	12,932	13,205	13,226	12,837	11,981	11,485	11,328	11,869	11,800
Carter	5,174	11,694	13,075	11,731	10,579	7,757	7,467	8,973	8,286	12,026	
Custer	7,221	10,452	13,753	14,119	13,156	12,656	12,642	12,923	12,984	13,076	
Fallon	5,514	9,152	14,089	15,839	15,178	13,971	12,641	13,111	12,219	12,706	
Powder River	8,924	10,297	15,161	13,356	13,725	12,268	11,168	10,459	10,147	12,514	
Rosebud	5,691	8,415	10,857	10,974	12,932	13,594	11,865	10,133	9,913	10,068	
Treasure	6,412	12,856	13,818	16,083	13,705	12,110	12,078	10,702	11,864	14,100	
Missoula Region	7,688	8,977	12,236	11,611	11,178	11,060	11,436	11,859	11,660	11,661	11,700
Mineral	5,367	8,464	9,898	9,381	9,723	8,963	10,197	9,966	9,753	9,494	
Missoula	8,110	9,266	12,826	12,168	11,624	11,615	11,965	12,265	12,222	12,171	
Reavell	6,727	7,931	10,625	10,101	9,934	9,602	9,961	10,025	10,187	10,367	

* NOTE: State totals are based on the latest available county data (April, 1988). Revised statewide data (August, 1988) is used in other chapters.

Source: U.S. Bureau of Economic Analysis (1959-1986 data) and Bureau of Business and Economic Research, University of Montana (1987 data).
Regional data computed by the Office of Research and Information Services, Montana Department of Commerce, 1988. The implicit price deflator for personal consumption expenditures was used to convert the original data to 1987 dollars. 1987 estimates are preliminary.

Table 2.16

PER CAPITA INCOME AS A PERCENT OF MONTANA AVERAGE BY REGION AND COUNTY											
REGION	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986	1987 Estimate
Montana	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Billings Region	109%	105%	110%	110%	109%	111%	111%	111%	110%	107%	107%
Big Horn	73%	83%	87%	93%	92%	85%	81%	82%	81%	90%	
Carbon	80%	94%	86%	94%	93%	92%	87%	86%	89%	90%	
Stillwater	90%	105%	92%	101%	100%	100%	101%	101%	97%	99%	
Sweet Grass	78%	99%	106%	103%	100%	95%	98%	99%	100%	108%	
Yellowstone	120%	109%	115%	114%	113%	116%	116%	116%	115%	110%	
Bozeman Region	95%	85%	93%	92%	92%	93%	96%	98%	99%	96%	96%
Gallatin	96%	83%	91%	90%	90%	92%	96%	98%	99%	93%	
Meagher	101%	91%	94%	89%	91%	87%	82%	80%	76%	95%	
Park	92%	89%	102%	98%	97%	98%	98%	101%	102%	104%	
Butte Region	99%	89%	95%	93%	96%	97%	97%	97%	98%	98%	99%
Beaverhead	107%	90%	99%	89%	92%	90%	89%	90%	90%	95%	
Deer Lodge	81%	80%	86%	81%	79%	78%	81%	83%	84%	87%	
Granite	100%	78%	96%	90%	88%	86%	92%	90%	87%	88%	
Madison	81%	84%	96%	89%	88%	81%	80%	83%	87%	93%	
Powell	100%	86%	85%	84%	85%	89%	89%	90%	91%	90%	
Silver Bow	107%	94%	98%	100%	106%	109%	109%	106%	107%	106%	
Glasgow-Wolf Point Region	72%	97%	88%	91%	101%	93%	86%	86%	83%	99%	99%
Daniels	78%	119%	96%	102%	117%	120%	95%	89%	87%	127%	
Phillips	79%	85%	85%	86%	92%	82%	75%	77%	71%	91%	
Roosevelt	60%	91%	81%	84%	86%	83%	81%	80%	80%	85%	
Sheridan	79%	108%	93%	96%	118%	108%	98%	98%	97%	116%	
Valley	76%	97%	90%	95%	109%	95%	88%	89%	86%	104%	
Glendive-Sidney Region	73%	101%	97%	106%	113%	102%	93%	95%	93%	100%	98%
Dawson	78%	100%	104%	110%	115%	111%	102%	102%	100%	102%	
Garfield	70%	145%	99%	99%	121%	100%	88%	76%	72%	116%	
McCone	56%	102%	86%	100%	108%	99%	82%	86%	80%	104%	
Prairie	76%	87%	85%	95%	91%	78%	74%	81%	78%	97%	
Richland	71%	97%	97%	106%	116%	100%	93%	96%	96%	96%	
Wibaux	92%	102%	80%	92%	97%	86%	79%	86%	78%	92%	
Great Falls Region	109%	109%	104%	106%	106%	107%	105%	105%	105%	109%	109%
Cascade	115%	110%	106%	108%	109%	109%	109%	112%	112%	111%	
Chouteau	123%	130%	88%	90%	121%	111%	103%	90%	90%	118%	
Glacier	79%	87%	105%	106%	98%	97%	92%	88%	87%	93%	
Pondera	97%	109%	87%	94%	102%	98%	93%	85%	80%	94%	
Teton	101%	111%	87%	95%	104%	99%	93%	88%	88%	108%	
Toole	96%	110%	114%	119%	120%	112%	107%	100%	99%	115%	
Havre Region	103%	99%	95%	96%	105%	97%	96%	90%	88%	101%	100%
Blaine	78%	77%	77%	76%	83%	77%	77%	75%	71%	85%	
Hill	108%	102%	101%	102%	106%	102%	100%	96%	94%	103%	
Liberty	152%	136%	102%	114%	132%	120%	124%	89%	92%	141%	
Helena Region	112%	110%	107%	108%	106%	109%	109%	109%	112%	107%	108%
Broadwater	86%	82%	92%	86%	82%	77%	79%	78%	75%	87%	
Jefferson	83%	83%	95%	100%	98%	102%	103%	105%	106%	105%	
Lewis & Clark	120%	117%	110%	110%	109%	112%	112%	113%	115%	109%	
Kalispell Region	102%	95%	94%	91%	88%	88%	92%	93%	93%	89%	90%
Flathead	107%	101%	105%	102%	98%	98%	103%	106%	104%	97%	
Lake	76%	76%	80%	78%	75%	76%	80%	80%	82%	82%	
Lincoln	122%	102%	85%	78%	80%	78%	84%	80%	80%	78%	
Sanders	90%	79%	77%	79%	74%	72%	75%	77%	75%	74%	
Lewistown Region	92%	106%	99%	97%	98%	92%	91%	89%	87%	97%	94%
Fergus	95%	104%	103%	100%	100%	95%	95%	92%	89%	97%	
Golden Valley	88%	101%	88%	85%	89%	86%	79%	85%	83%	106%	
Judith Basin	110%	117%	84%	83%	79%	75%	79%	82%	78%	95%	
Musselshell	75%	105%	99%	106%	107%	105%	96%	91%	90%	91%	
Petroleum	82%	87%	71%	55%	74%	54%	45%	43%	48%	83%	
Wheatland	88%	115%	103%	96%	106%	96%	91%	96%	98%	111%	
Miles City Region	89%	107%	104%	107%	106%	107%	100%	96%	96%	96%	95%
Carter	71%	125%	105%	95%	85%	64%	62%	75%	70%	97%	
Custer	99%	112%	110%	115%	105%	105%	106%	108%	110%	106%	
Fallon	76%	98%	113%	129%	122%	116%	106%	109%	103%	105%	
Powder River	95%	110%	122%	108%	110%	102%	93%	89%	86%	101%	
Rosebud	78%	90%	86%	89%	104%	113%	99%	85%	84%	81%	
Treasure	88%	138%	111%	131%	110%	100%	101%	89%	100%	114%	
Missoula Region	106%	96%	98%	94%	90%	92%	96%	97%	99%	94%	94%
Mineral	74%	91%	80%	76%	78%	74%	85%	83%	82%	77%	
Missoula	111%	99%	105%	99%	95%	96%	100%	102%	105%	98%	
Reavell	92%	85%	85%	82%	80%	80%	83%	84%	86%	84%	

Source: U.S. Bureau of Economic Analysis. Regional data and percentages computed by the Office of Research and Information Services, Montana Department of Commerce, 1988. 1987 estimates are preliminary.

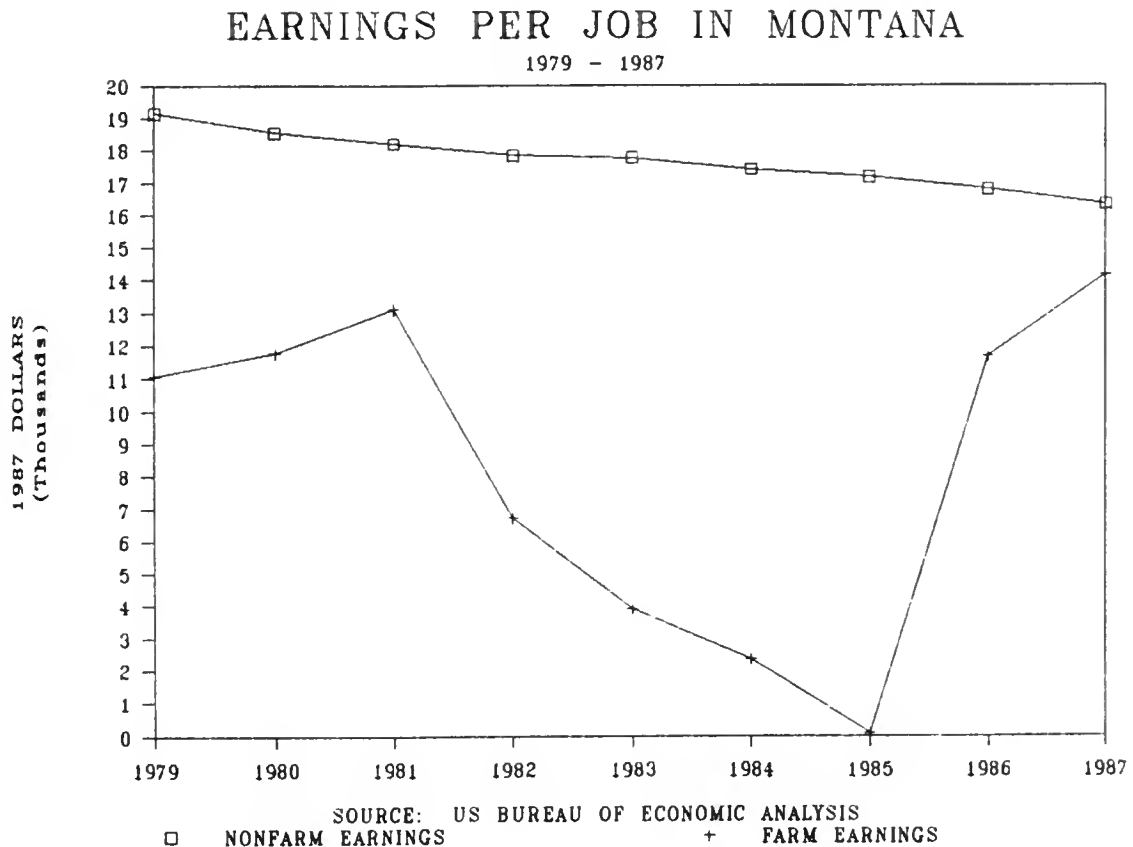
Table 2.17

EARNINGS PER JOB IN MONTANA: 1969 - 1986
(in 1987 dollars)

YEAR	FARM EARNINGS PER FARM EMPLOYEE	NONFARM EARNINGS PER NONFARM EMPLOYEE
1969	19,161	17,519
1979	11,077	19,141
1980	11,763	18,538
1981	13,113	18,202
1982	6,724	17,839
1983	3,925	17,763
1984	2,350	17,402
1985	518	17,135
1986	13,324	16,746

Source: U.S. Bureau of Economic Analysis. Regional data computed by the Office of Research and Information Services, Montana Department of Commerce, 1988. The implicit price deflator for personal consumption expenditures was used to convert the original data to 1987 dollars.

Figure 2.13



The Billings Region

Located in south central Montana, the Billings Region includes Big Horn, Carbon, Stillwater, Sweetgrass, and Yellowstone counties.

Labor Force

The Billings Region, the most populous, ranked first in the number of total jobs in 1986. The region's 78,788 jobs accounted for 19.3 percent of all jobs in the state, up from 16.2 percent in 1969 (Figures 2.3 and 2.14). Most of the jobs were in Yellowstone County, ranking it first among counties in 1986 for total jobs.

Total jobs growth in the Billings Region was steady during the 1970s until 1979 when a decline in jobs throughout the state impeded growth (Table 2.18). Growth continued in the early 1980s—even during 1981 when jobs once again declined statewide. From 1984 until 1986, however, a marked decline in wage/salary jobs took place statewide, but a steady increase in the number of self-employed offset this decline, producing modest growth. The increase in the number of self-employed in the Billings Region, however, was low, and a large decline in wage/salary jobs from 1984 to 1986 (principally in Yellowstone County) resulted in total number of jobs in the region declining during 1984–1985 (Table 2.18). This decline reversed slightly during the following year, but even into 1986–1987, the decline in wage/salary jobs continued, although the loss was much smaller than in previous years (Table 2.19).

The importance of the self-employed to both the Montana economy and the Billings Region economy is evident in Table 2.5. From 1979 to 1986, wage/salary jobs in the Billings Region grew only 0.1 percent, with a period of growth from 1979 to 1984 followed by an offsetting decline from 1984 to 1986. However, during this period, the number of self-employed increased by 40.8 percent, an increase second only to the Helena Region. Because of this extraordinary growth, the total number of jobs in the Billings Region grew by 7.7 percent between 1979 and 1986, for an average annual growth rate of 1.1 percent.

Historically, key industries in this region have included (in order by share in the total number of jobs) services, retail trade, and government, followed distantly by agriculture and manufacturing. This order reflects the relative importance of industries at the state level, but agriculture and government occupy a smaller share of total jobs in the Billings Region than they do statewide. In Montana, agriculture accounted for 9 percent of total jobs in 1986, while in the Billings Region it was 6 percent. Statewide, government (local, state, and federal) accounted for 18 percent, while it was only 13 percent in the region. In contrast, wholesale trade, retail trade, and services relatively are more important, and indicate the importance of Yellowstone County as a trade and service center for eastern Montana and northern Wyoming.

The 1970s exhibited strong job growth for almost all sectors in the Billings

Region, with agriculture as the single exception. Slow growth, however, characterized the 1980s. Health and business services and retail trade expanded, while manufacturing (particularly food/kindred products, and lumber/wood products) construction, and railroad (Burlington Northern reorganization) jobs declined. The closing of two major meat-packing plants--the Pierce packing plant in late 1984 and the Midland plant in early 1985--resulted in the loss of several hundred manufacturing jobs. By 1985, both total jobs and wage/salary jobs had begun to decline. And, the closure of the Boise Cascade modular home manufacturing facility added to that decline. Between 1984 and 1986, wage/salary job declines were prevalent in nearly every major industry group in the Billings Region, with services as the only group that posted a significant increase.

During 1986-1987, many of these declines continued (Table 2.19), causing total wage/salary jobs to decline by 0.7 percent. Declining industries included construction, oil/gas extraction, local and interurban passenger transit, and state and local government. Renewed growth, however, characterized several of the larger sectors in 1986-1987 as retail trade, finance/insurance/real estate, and services all showed moderate growth. Private health services grew by more than 300 jobs, excluding the self-employed, providing the largest increase in wage/salary jobs among the regional industries.

Throughout the 1970s and the first half of the 1980s, the unemployment rate in the Billings Region consistently was below the statewide unemployment rate (Figure 2.16). Since 1985, the region's unemployment rate has been slightly higher than the statewide average. In 1987, the unemployment rate in the region ranked eighth out of the 12 regions. Carbon, Stillwater, Sweet Grass, and Yellowstone counties ranked in the middle of the statewide range, but Big Horn County ranked last at 13.6 percent.

Population

The Billings Region has experienced rapid growth since 1950, and ranked first in total population in 1987. Historically, the region experienced a decline or low population growth only in the 1920s and the 1960s (Table 2.8). More recently, population increased by 31 percent between 1969 and 1987, nearly twice the statewide 17 percent increase. After peaking in 1985 at 150,100, however, population declined slightly in 1986 and 1987 to 146,700, reflecting a statewide trend. Table 2.18 shows that most of the regional population is found in Montana's most populous county--Yellowstone.

A close parallel between total jobs and population held for the Billings Region between 1969 and 1986 (Figures 2.14 and 2.15). Both population and total jobs experienced steady growth during the 1970s. But between 1979 and 1980, jobs fell slightly and population growth was basically zero. Then, until the mid-1980s, the moderate growth in jobs paralleled a steady population increase. Since 1984, jobs generally have declined; population growth first slowed and then turned negative between 1985 and 1987.

Income

As in jobs and population, the Billings Region ranked first in total personal income in 1986 (Table 2.18). With more than 80 percent of the regional income, Yellowstone County accounted for the largest amount of income of any county in the state. Other counties in the region ranked in the middle of the distribution.

Changes in total personal income and its components basically have imitated changes at the state level (see Figure 2.17 for the Billings Region and Figure 2.11 for the state). The main difference is the relatively stronger total personal income growth in the Billings Region, which partially reflects the smaller share of total worker earnings represented by agriculture within Yellowstone County. Between 1979 and 1986, total personal income grew by 5.8 percent, nearly twice the statewide average of 3 percent (Table 2.10).

It is important to note that nearly all of this growth occurred in property income and transfer payments rather than in nonfarm and farm worker earnings. High interest rates during the 1980-1982 recession produced strong growth in property income during this period. Growth continued until 1984, but since then property income has remained relatively stable. Transfer payments experienced steady growth between 1979 and 1987.

In contrast, regional nonfarm worker earnings mimicked the state, increasing only in 1983 and 1984 and declining in every other year during the 1979-1987 period. The national recession during 1980-1982 and Montana recessions in 1985 and 1986 hindered the growth of nonfarm earnings.

After moderate growth in 1980, farm earnings declined until 1982 and then stagnated through 1985. After the end of a severe drought in 1985, growth in farm earnings returned in 1986 and 1987. A large increase in 1986 was sufficient to overcome declining nonfarm earnings, and total personal income increased. Growth of farm earnings the next year was more than offset by declining nonfarm earnings, and total personal income declined in 1987.

The Billings Region ranked first in per capita personal income for the 1982-1986 period. Historically, the region's per capita income generally has been well above the state average (Tables 2.15 and 2.16), reflecting the strong performance of Yellowstone County. Per capita income in Sweet Grass and Stillwater counties has been close to the Montana average, but consistently below the state average in Carbon and Big Horn counties.

As shown in Table 2.18, per capita income increased substantially in the 1960s and 1970s, growing from about \$8,000 in 1959 to well over \$13,000 in 1979. In recent years, however, performance has been erratic as a result of recessions coupled with population growth--two factors that tend to lower per capita income. Between 1979 and 1983, per capita income declined despite steady growth in total personal income because population growth also was strong. This decline was interrupted in 1984 with the recovery from the earlier recession, but continued in 1985 with the advent of a new recession in Montana. Between 1985 and 1987, however, population declined and per capita income once again posted increases.

Figure 2.14

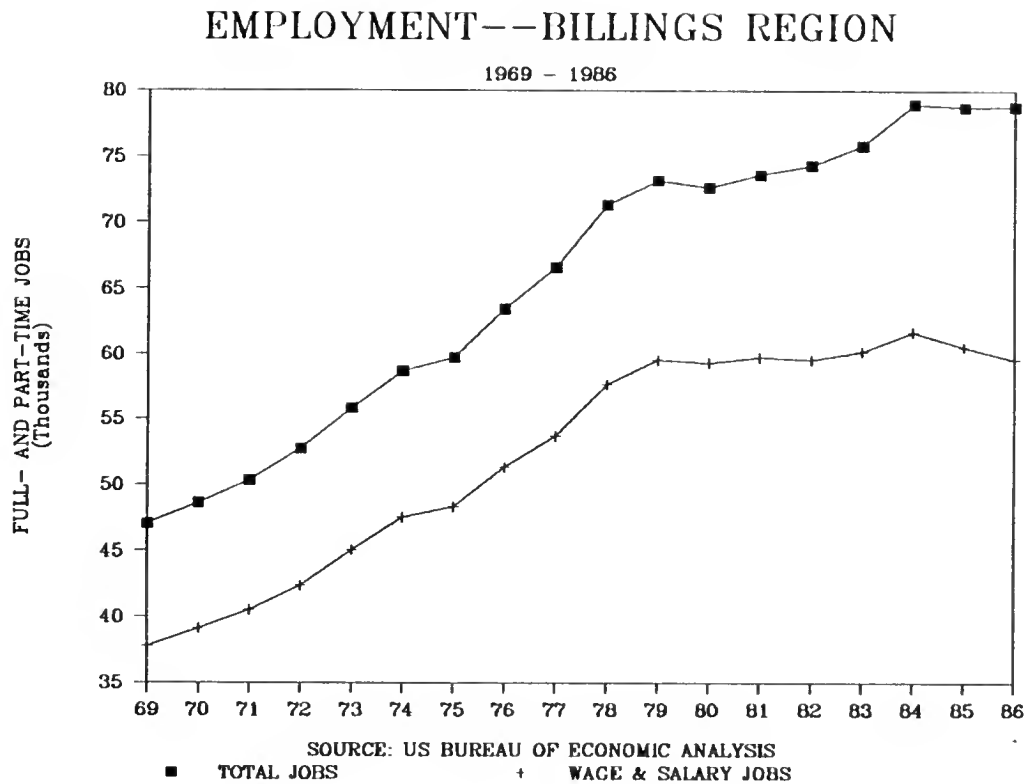


Figure 2.15

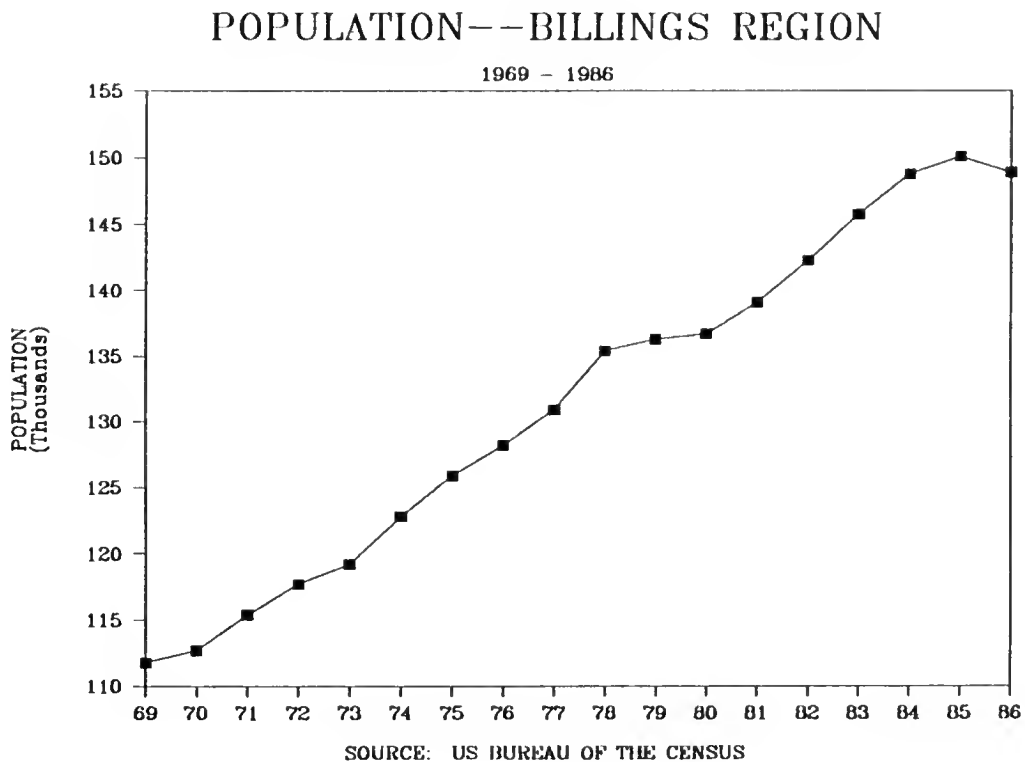


Table 2.18

The Billings Region											Rank in State /d (Region or County)	
	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986	1987 /p	
Population /a												
Region	105,200	111,800	136,300	136,700	139,100	142,300	145,800	148,800	150,100	148,900	146,700	1
Big Horn	9,900	10,100	10,900	11,200	11,400	11,400	11,300	11,500	11,600	11,200	11,000	18
Carbon	8,200	7,200	8,400	8,100	8,200	8,300	8,500	8,700	8,600	8,500	8,300	24
Stillwater	5,500	4,700	5,800	5,600	5,700	5,800	5,900	6,100	6,100	6,000	6,200	31
Sweet Grass	3,500	3,000	3,200	3,200	3,300	3,300	3,300	3,400	3,300	3,200	3,100	41
Yellowstone	78,300	86,800	108,000	108,600	110,500	113,500	116,800	119,100	120,500	120,000	118,100	1
Total Jobs /b												
Region	...	47,060	73,188	72,706	73,651	74,348	75,849	78,958	78,732	78,788	...	1
Big Horn	...	3,541	5,147	5,593	5,066	4,812	4,764	4,889	4,959	4,735	...	20
Carbon	...	2,720	3,104	3,098	3,171	3,367	3,474	3,483	3,531	...	...	24
Stillwater	...	1,776	2,236	2,227	2,244	2,268	2,325	2,395	2,390	2,479	...	36
Sweet Grass	...	1,357	1,531	1,502	1,520	1,535	1,534	1,593	1,586	1,584	...	39
Yellowstone	...	37,666	61,170	60,286	61,650	62,562	63,859	66,607	66,314	66,459	...	1
Wage & Salary Jobs /b												
Region	...	37,768	59,537	59,310	59,738	59,571	60,196	61,691	60,569	59,567	...	1
Big Horn	...	2,556	4,154	4,626	4,139	3,854	3,752	3,817	3,858	3,596	...	20
Carbon	...	1,462	1,808	1,808	1,879	1,851	1,924	1,949	1,922	1,916	...	28
Stillwater	...	948	1,364	1,405	1,425	1,368	1,397	1,439	1,411	1,465	...	36
Sweet Grass	...	832	966	950	976	949	920	944	919	892	...	41
Yellowstone	...	31,970	51,245	50,521	51,319	51,569	52,203	53,542	52,459	51,698	...	1
Unemployment Rate /c												
Region	...	4.2%	3.7%	4.8%	5.5%	6.7%	7.9%	7.2%	7.5%	8.2%	7.6%	8
Big Horn	...	4.6%	5.0%	6.4%	9.2%	9.1%	8.5%	8.8%	10.2%	14.6%	13.6%	50
Carbon	...	4.9%	4.3%	4.4%	4.6%	7.2%	7.4%	7.4%	7.4%	8.1%	7.4%	32
Stillwater	...	3.8%	3.3%	3.8%	4.0%	8.5%	11.2%	8.6%	7.7%	8.3%	6.5%	21
Sweet Grass	...	1.4%	1.2%	2.1%	3.4%	4.5%	4.8%	6.0%	6.4%	7.5%	6.8%	25
Yellowstone	...	4.2%	3.7%	4.8%	5.3%	6.4%	7.8%	7.0%	7.3%	7.7%	7.2%	29
Total Personal Income (\$1000s) /b												
Region	836,456	1,097,914	1,862,145	1,859,532	1,887,774	1,905,800	1,929,641	1,972,854	1,955,255	1,971,015	1,956,000	1
Big Horn	52,676	77,850	117,923	127,215	130,571	116,285	110,317	113,555	111,817	124,778	...	19
Carbon	47,992	63,067	90,012	93,776	94,980	91,944	89,180	88,974	90,559	94,574	...	25
Stillwater	36,057	46,328	66,466	69,783	70,797	69,511	71,396	73,557	70,576	73,705	...	33
Sweet Grass	18,794	27,776	42,820	40,965	40,753	37,902	38,584	39,674	39,150	42,834	...	39
Yellowstone	680,935	882,892	1,544,924	1,527,795	1,550,674	1,590,158	1,620,165	1,657,095	1,643,153	1,635,124	...	1
Per Capita Personal Income /b												
Region	7,951	9,820	13,658	13,605	13,587	13,587	13,229	13,265	13,021	13,256	13,300	1
Big Horn	5,321	7,744	10,787	11,406	11,499	10,196	9,729	9,854	9,607	11,150	...	42
Carbon	5,853	8,756	10,715	11,553	11,620	11,057	10,457	10,269	10,555	11,099	...	36
Stillwater	6,556	9,834	11,504	12,434	12,517	11,995	12,054	12,148	11,500	12,237	...	19
Sweet Grass	5,695	9,225	15,200	12,694	12,470	11,503	11,735	11,815	11,831	13,373	...	17
Yellowstone	8,696	10,169	14,306	14,072	14,034	14,004	13,873	13,911	13,636	13,631	...	1
Nonfarm Earnings (\$1000s) /b												
Region	600,981	779,621	1,408,352	1,373,423	1,335,282	1,334,778	1,357,554	1,384,823	1,368,480	1,331,437	1,309,000	1
Big Horn	27,785	37,465	102,881	122,177	94,449	85,076	82,638	84,159	85,887	82,206	...	17
Carbon	20,833	23,728	32,557	31,677	31,555	28,845	30,371	30,739	32,513	31,589	...	30
Stillwater	13,637	15,707	24,517	25,410	25,464	22,995	23,747	25,160	24,993	26,077	...	36
Sweet Grass	8,091	10,869	15,286	13,720	13,573	13,444	13,246	14,436	14,398	13,853	...	41
Yellowstone	530,635	691,853	1,233,310	1,180,439	1,170,241	1,184,418	1,207,553	1,230,328	1,210,888	1,177,713	...	1
Farm Earnings (\$1000s) /b												
Region	66,160	100,902	46,820	50,629	37,304	20,345	15,247	16,297	10,071	49,338	53,000	2
Big Horn	14,899	27,575	17,690	19,000	17,086	8,090	5,191	4,317	1,051	16,662	...	5
Carbon	12,438	16,065	8,479	8,147	6,751	3,302	589	868	1,390	6,915	...	27
Stillwater	10,585	14,328	6,083	6,625	5,041	2,678	2,126	2,800	1,247	4,715	...	36
Sweet Grass	4,847	8,359	8,487	7,250	5,756	2,824	2,508	2,395	1,854	6,419	...	29
Yellowstone	23,412	34,573	8,081	9,607	2,669	3,451	4,833	5,919	4,549	14,626	...	8
Property Income (\$1000s) /b												
Region	127,843	156,976	285,761	297,006	344,478	360,529	360,572	380,182	381,480	383,947	387,000	1
Big Horn	6,656	8,164	12,720	13,373	15,339	15,351	14,029	15,508	15,435	15,417	...	36
Carbon	6,996	10,784	20,984	22,727	25,756	26,754	26,249	27,593	27,354	27,255	...	17
Stillwater	7,481	9,505	14,782	15,754	17,694	19,275	20,804	22,100	21,091	21,000	...	25
Sweet Grass	4,014	5,768	11,320	11,663	13,033	13,193	14,346	14,439	14,219	14,146	...	38
Yellowstone	102,696	122,756	225,954	233,489	272,657	285,956	285,145	300,541	305,580	306,130	...	1
Transfer Payments (\$1000s) /b												
Region	62,473	101,549	210,682	226,900	237,997	252,701	267,812	274,627	284,337	294,642	296,000	1
Big Horn	5,076	7,794	15,420	16,591	17,733	18,113	18,645	19,551	20,542	21,433	...	22
Carbon	6,745	8,971	16,825	18,013	18,343	18,778	19,798	19,981	20,367	20,986	...	23
Stillwater	5,230	5,386	10,758	11,238	12,011	12,675	13,884	13,994	14,441	14,991	...	29
Sweet Grass	2,035	3,090	5,393	5,884	6,358	6,551	6,723	6,986	7,323	7,453	...	40
Yellowstone	45,388	76,308	162,286	175,174	183,553	196,583	208,761	214,114	221,664	229,779	...	1

/a U.S. Bureau of the Census

/b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average)

/p 1987 data consists of preliminary estimates.

Table 2.19

WAGE & SALARY EMPLOYMENT IN THE BILLINGS REGION*: 1986-1987

INDUSTRY	SIC** CODE	1986	1987	CHANGE	PERCENT CHANGE
Total Wage and Salary Employment		51,437	51,054	(383)	-0.7%
Total Private		42,206	41,937	(269)	-0.6%
Agriculture, Forestry, Fishing, Hunting, & Trapping		528	532	4	0.8%
Agricultural Production--Crops ***	01	107	84	(23)	-21.5%
Agricultural Production--Livestock ***	02	200	207	7	3.5%
Agricultural Services	07	217	237	20	9.2%
Forestry	08				
Fishing, Hunting, and Trapping	09				
Mining		1,264	*0*	*0*	*0*
Metal Mining	10	40	*0*	*0*	*0*
Coal Mining	12	647	615	(32)	-4.9%
Oil and Gas Extraction	13	423	280	(143)	-33.8%
Mining of Non-Metallic Minerals, Except Fuels	14	151	160	9	6.0%
Construction		2,304	1,703	(601)	-26.1%
General Building Contractors	15	586	473	(113)	-19.3%
Heavy Construction Contractors	16	506	221	(285)	-56.3%
Special Trade Contractors	17	1,208	1,005	(203)	-16.8%
Manufacturing		3,305	3,250	(55)	-1.7%
Food and Kindred Products	20	915	979	64	7.0%
Textile Mill Products	22		*0*	*0*	*0*
Apparel and Other Textile Products	23	14	*0*	*0*	*0*
Lumber and Wood Products	24	182	164	(18)	-9.9%
Furniture and Fixtures	25	44	55	11	25.0%
Paper and Allied Products	26		*0*	*0*	*0*
Printing and Publishing	27	663	651	(12)	-1.8%
Chemicals and Allied Products	28	100	103	3	3.0%
Petroleum Refining and Related Industries	29	523	488	(35)	-6.7%
Rubber and Miscellaneous Plastic Products	30	18	28	10	55.6%
Leather and Leather Products	31	*0*	*0*	*0*	*0*
Stone, Clay, Glass, and Concrete Products	32	210	182	(28)	-13.3%
Primary Metals Processing	33		*0*	*0*	*0*
Fabricated Metal Products	34	205	201	(4)	-2.0%
Machinery, Except Electrical	35	134	102	(32)	-23.9%
Electrical and Electronic Equipment	36	*0*	*0*	*0*	*0*
Transportation Equipment	37	74	84	10	13.5%
Instruments and Related Products	38	*0*	*0*	*0*	*0*
Miscellaneous Manufacturing Industries	39	203	179	(24)	-11.8%
Transportation and Public Utilities		3,512	3,228	(284)	-8.1%
Local and Interurban Passenger Transit	41	274	156	(118)	-43.1%
Trucking and Warehousing	42	1,440	1,370	(70)	-4.9%
Water Transportation	44				
Transportation by Air	45	245	236	(9)	-3.7%
Pipelines, Except Natural Gas	46	87	67	(20)	-23.0%
Transportation Services	47	108	110	2	1.9%
Communications	48	817	755	(62)	-7.6%
Electric, Gas, and Sanitary Services	49	534	527	(7)	-1.3%
Wholesale Trade		4,583	4,537	(46)	-1.0%
Durable Goods	50	2,943	2,902	(41)	-1.4%
Nondurable Goods	51	1,639	1,634	(5)	-0.3%
Retail Trade		11,650	11,911	261	2.2%
Building Materials and Hardware	52	494	458	(36)	-7.3%
General Merchandise Stores	53	1,622	1,703	81	5.0%
Food Stores	54	1,641	1,622	(19)	-1.2%
Automotive Dealers and Service Stations	55	1,439	1,526	87	6.0%
Apparel and Accessory Stores	56	520	547	27	5.2%
Furniture and Home Furnishings Stores	57	467	473	6	1.3%
Eating and Drinking Places	58	4,413	4,472	59	1.3%
Miscellaneous Retail	59	1,041	1,098	57	5.5%
Finance, Insurance, and Real Estate		2,710	2,762	52	1.9%
Banking	60	1,064	1,066	2	0.2%
Credit Agencies other than Banks	61	333	331	(2)	-0.6%
Security, Commodity Brokers, and Services	62	163	169	6	3.7%
Insurance Carriers	63	140	175	35	25.0%
Insurance Agents, Brokers, and Services	64	294	298	4	1.4%
Real Estate	65	600	618	18	3.0%
Combined Real Estate, Insurance, Etc.	66	32	29	(3)	-9.4%
Holding and Other Investment Offices	67	76	69	(7)	-9.2%
Services		12,317	12,720	403	3.3%
Hotels and Other Lodging Places	70	1,000	1,060	60	6.0%
Personal Services	72	697	666	(31)	-4.4%
Business Services	73	1,903	1,858	(45)	-2.4%
Auto Repair, Services, and Garages	75	435	440	5	1.1%
Miscellaneous Repair Services	76	271	284	13	4.8%
Motion Pictures	78	87	83	(4)	-4.6%
Amusement and Recreation Services	79	511	517	6	1.2%
Private Health Services	80	4,285	4,632	347	8.1%
Legal Services	81	481	498	17	3.5%
Private Educational Services	82	291	300	9	3.1%
Private Social Services	83	813	849	36	4.4%
Museums, Art Galleries, Etc.	84	18	20	2	11.1%
Membership Organizations Including Tribal Gov't	86	590	582	(8)	-1.4%
Private Households	88	68	69	1	1.5%
Engineering, Accounting, and Other Services	89	840	830	(10)	-1.2%
Non-Classifiable	99	15	*0*	*0*	*0*
Government		9,229	9,115	(114)	-1.2%
State		1,302	1,176	(126)	-9.7%
Local		5,749	5,685	(64)	-1.1%
Federal		2,171	2,248	77	3.5%

*Includes only employment covered by the Unemployment Insurance Program.

**Standard Industrial Classification

***These values represent a very small portion of wage/salary employment for this industry.

0 indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.16

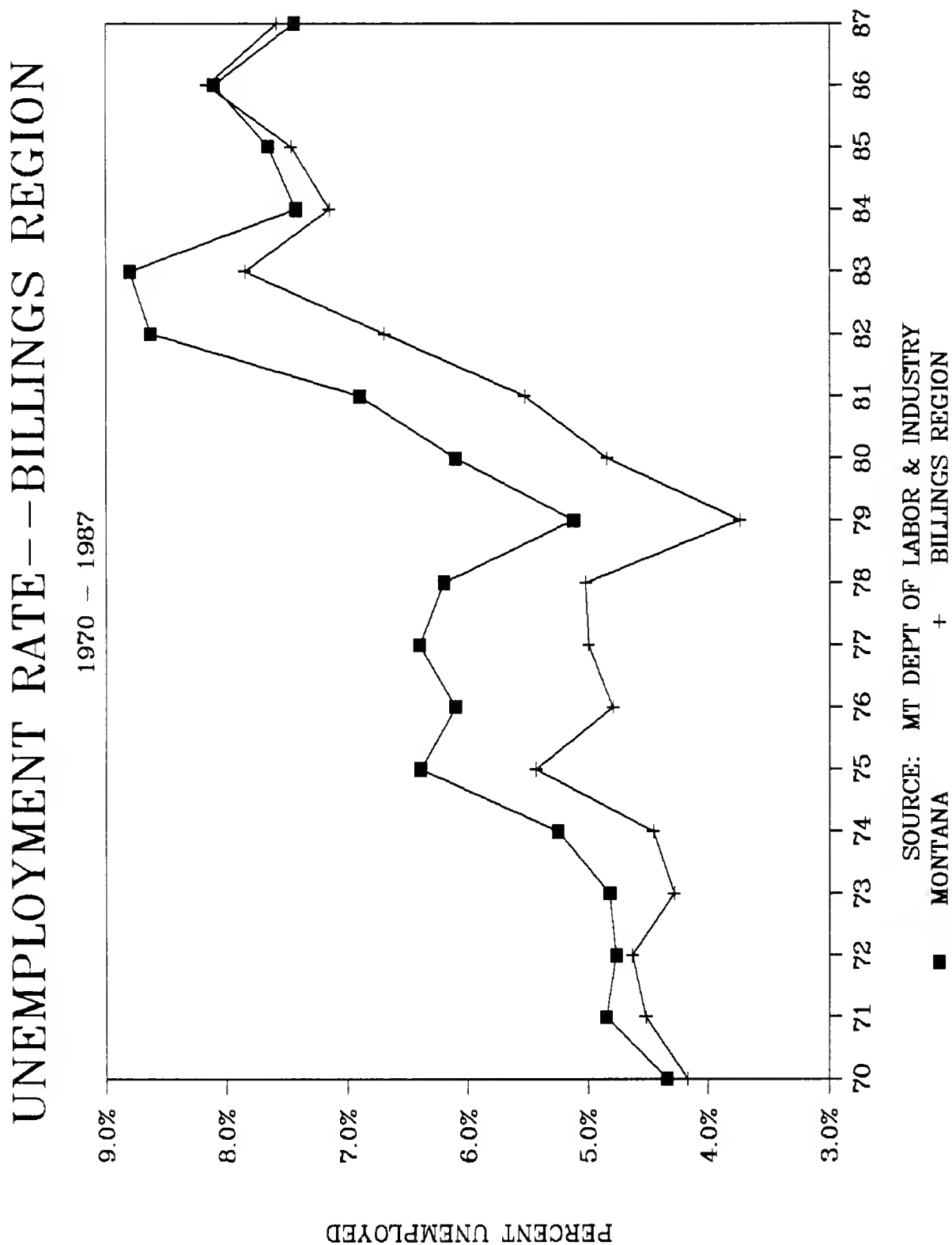
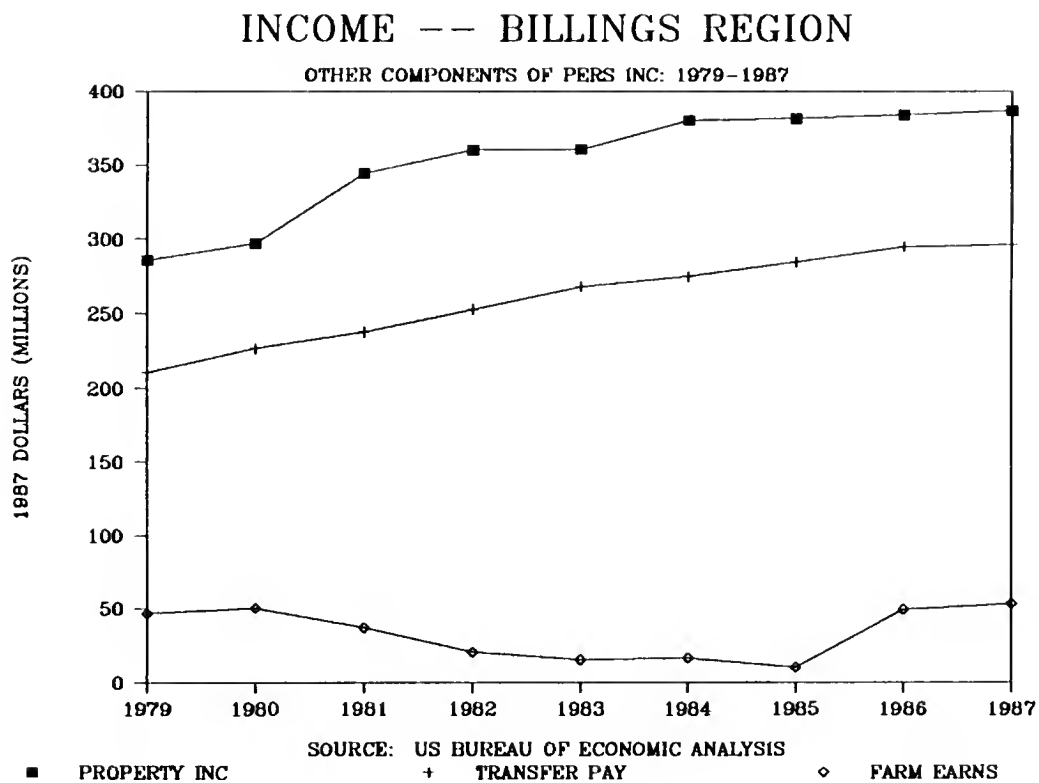
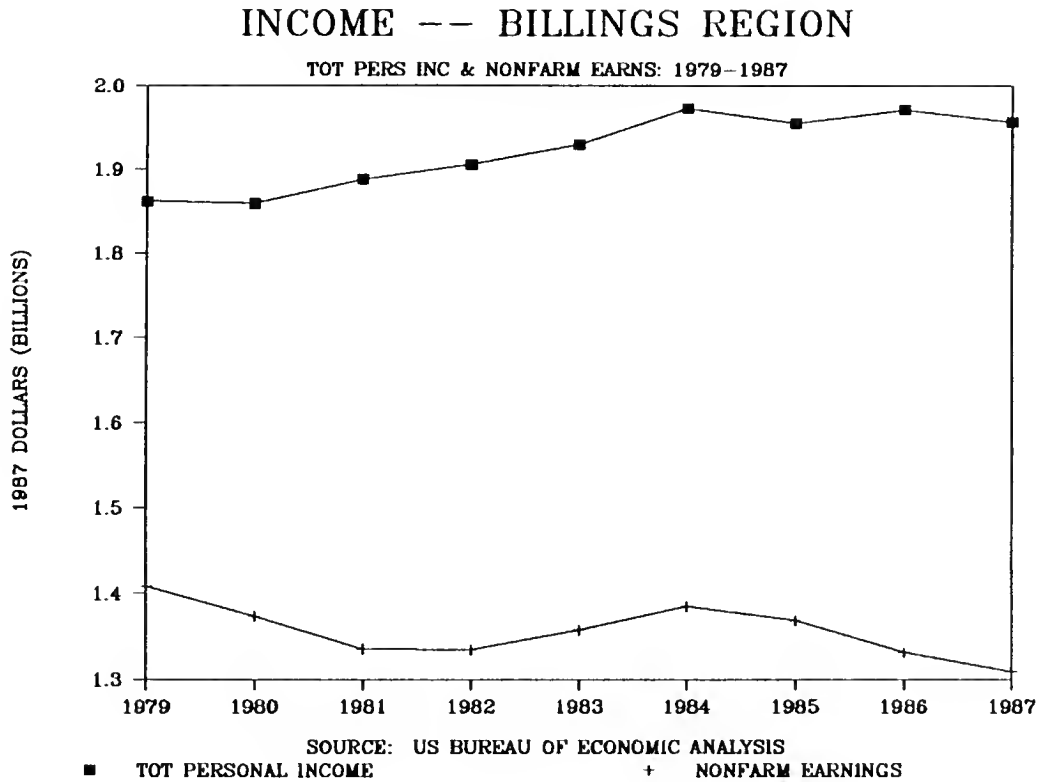


Figure 2.17



The Bozeman Region

The Bozeman Region is made up of Gallatin, Meagher, and Park counties in southwest Montana.

Labor Force

In 1986 the Bozeman Region had more than 33,000 total jobs, which ranked sixth in the regions. Jobs were located predominantly in Gallatin County, one of Montana's largest employing counties (Table 2.20).

Between 1969 and 1986, the Bozeman Region experienced an 87 percent increase in jobs--the largest percentage growth of all regions. In the period between 1979 and 1986, the region's growth also ranked first with a 15.6 percent increase, while jobs in Montana grew by 3.4 percent. The region suffered only two years of decline in the total number of jobs--1975 and 1980--when the state and the nation experienced either economic slowdowns or recessions (Figure 2.18). Wage/salary jobs followed this same pattern until 1986 when a decline was offset by growth in the number of self-employed, thus maintaining growth in the total number of jobs. Decline in wage/salary jobs continued between 1986 and 1987.

Increases in the number of self-employed in the Bozeman Region from 1979 until 1986 played a key role in the region's continued growth. As Table 2.5 shows, the self-employed growth rate was 40 percent (third highest among regions), while wage/salary jobs grew by 9 percent (first among regions). Comparatively, the statewide self-employed growth rate was 30 percent and the wage/salary growth rate was minus 4 percent.

Three sectors dominate Bozeman Region jobs: retail trade, services, and government. Retail trade and government are somewhat more important to the region than the average statewide, in part reflecting the influence of Montana State University on the region's economy. Within these sectors, key industries include eating/drinking places, health services, hotels/other lodging places, and state/local government.

The vitality of the lodging sector and eating/drinking establishments indicates the importance of the travel industry in this region. Major attractions include Yellowstone National Park, ski resorts, and events at Montana State University.

During the 1970s, every sector in the region experienced significant job growth except for agriculture, which declined regionally and statewide. But between 1979 and 1987, growth and decline were divided more evenly in the region. Eating/drinking places, business/lodging/health services, and wholesale trade provided most of the jobs increase, while manufacturing, transportation and public utilities, and construction all experienced a loss in wage/salary jobs. Specific industries experiencing large declines in recent years include building construction, lumber/wood products, electrical/electronic equipment, and railroad transportation (closure of the Livingston locomotive repair facility, which reopened at a lower employment

level in 1988).

Table 2.21 shows the decline in these sectors between 1986 and 1987. Wage/salary jobs declined by 1.2 percent during this period, for a loss of 250 jobs, despite strong performance by private business services. Because the numbers used are yearly averages, however, declines in 1986 obscure the gradual recovery that began in 1987. Between the fourth quarter of 1986 and the fourth quarter of 1987, wage/salary jobs actually declined by less than 20 jobs.

The Bozeman Region had the lowest unemployment rate (6.3 percent) in 1987 of all regions. The state's rate was markedly higher at 7.4 percent. Historically, the region's performance has been much better than the state, with the unemployment rate remaining far below the state average for all years except 1975 and 1980, two periods of recession in most regions of Montana (Figure 2.20).

Population

Based on 1987 data, the Bozeman Region ranked sixth in population, with an estimated 63,000, most being residents of Gallatin County. Population growth in this region is notable. Historically, population growth was strong in every decade except the 1920s, with the rate of increase generally becoming larger with each decade (Table 2.8). From 1969 until 1986, population in the region increased in every year, resulting in a 41 percent increase over the entire period (Figure 2.19). Population in 1987, however, declined slightly, reflecting a statewide trend. Between 1979 and 1987, when the state population grew by only 2.5 percent, population in the region grew by 10.1 percent, making it one of the fastest growing regions in the state for this period.

Income

With the exception of property income, 1986 rankings for total personal income and its components were slightly lower than the rankings for population and jobs in the Bozeman Region (Table 2.20). Total personal income ranked seventh, with most of this income located in Gallatin County.

Like other high growth regions, the Bozeman Region experienced above average growth in income between 1979 and 1987. While total personal income for the state grew by only 3 percent, growth in the Bozeman Region was the highest in the state at 14 percent. Table 2.10 shows that this high growth dates back to the 1970s. A comparison of Figure 2.21 (for the Bozeman Region) and Figure 2.11 (for the state) illustrates this growth. After declining slightly in 1980, total personal income increased steadily through 1986 before declining again in 1987.

Steady growth in property income and transfer payments has supported the growth of total personal income, but unlike several other regions (and to some extent the state), these components have not been the only source of growth for personal income during the state's recessions. Growth in nonfarm

earnings, contrary to the statewide trend, contributed much to the growth of total personal income during the 1980s. The period between 1980 and 1985 was one of continued growth in nonfarm earnings in the region, while the state experienced a net decline in this income component. In 1986 and 1987, however, the region's exceptional performance came to an end, and nonfarm earnings followed the statewide trend and declined slightly in both years.

Although the region ranked seventh in 1986 in farm earnings, Gallatin County ranked second. The region's pattern of farm earnings generally was much closer to that of the state between 1979 and 1987. After a slight decline between 1979 and 1981, farm earnings in the region reached a low in 1982 and remained there through 1985. Like the state, the region experienced renewed growth in farm earnings in 1986, which contributed to total personal income growth despite a decline in nonfarm earnings. In 1987, farm earnings were comparable to the 1986 level, and the decline in nonfarm earnings affected total personal income.

Growth in per capita personal income in the region has been modest (Table 2.20), with the average for 1982-1986 ranking the region seventh of the 12 regions. Park County, ranking 16th among counties, consistently had the highest per capita income, followed by Gallatin and Meagher counties. Per capita income in the region as well as in Gallatin and Meagher counties historically has remained slightly below the state average, while in recent years per capita income in Park County has been slightly higher than the Montana average (Table 2.15).

With strong growth in population and total personal income in recent years (Figure 2.19 and Table 2.20), two opposing factors influenced the growth of per capita income: higher population meant lower per capita income and higher total income meant higher per capita income. Between 1982 and 1987, growth in total personal income (aided by the decline in population in 1987) was the stronger factor, and per capita income increased during every year except 1985 when the Montana recession slowed income growth.

Figure 2.18

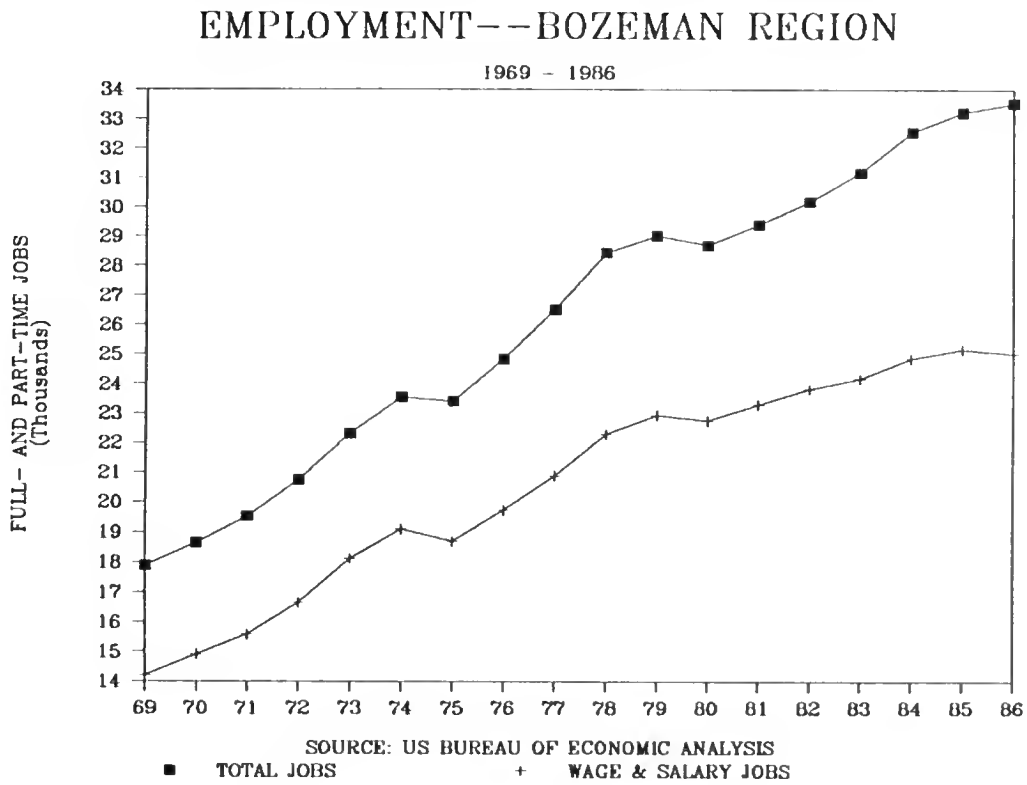


Figure 2.19

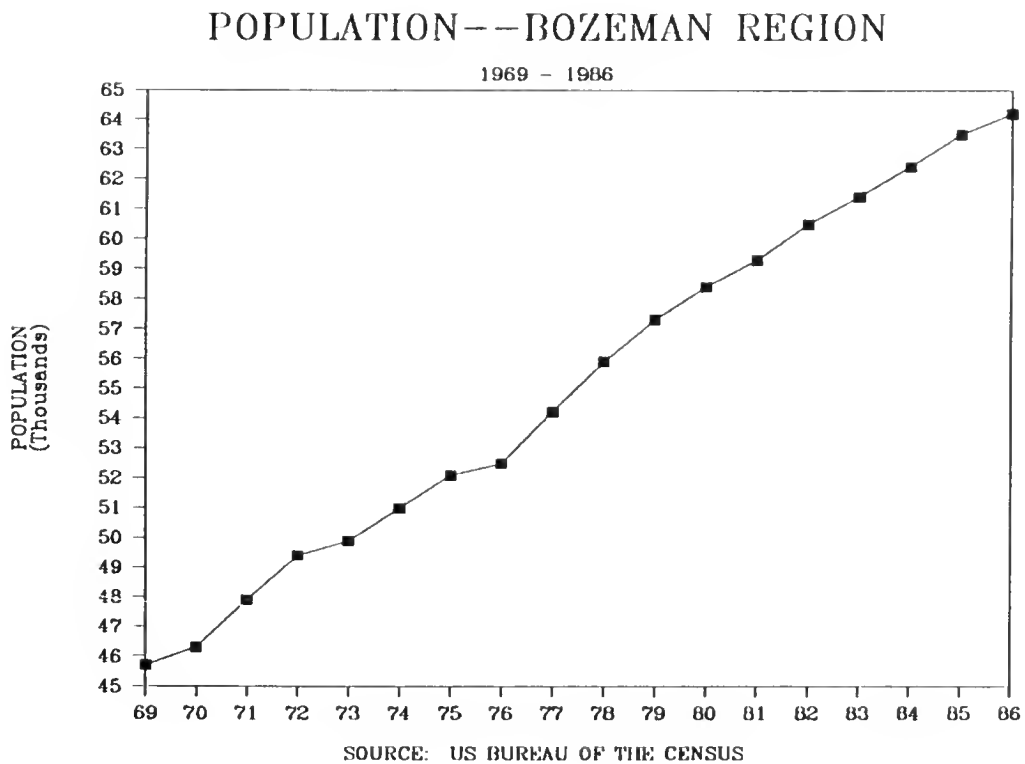


Table 2.20

The Bozeman Region											Rank in State /d	
	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986	1987 /p	(Region or County)
<hr/>												
Population /a												
Region	41,500	45,700	57,300	58,400	59,300	60,500	61,400	62,400	63,500	64,200	63,100	6
Gallatin	25,800	32,000	42,000	43,100	43,700	45,000	45,600	46,800	47,800	49,100	48,700	5
Meagher	2,600	2,200	2,300	2,200	2,200	2,200	2,300	2,200	2,200	2,100	2,100	49
Park	13,100	11,500	13,000	13,100	13,400	13,300	13,500	13,400	13,500	13,000	12,300	14
Total Jobs /b												
Region	...	17,894	29,023	28,699	29,420	30,203	31,194	32,577	33,233	33,542	...	5
Gallatin	...	12,508	21,498	21,485	22,318	23,229	24,240	25,377	25,917	26,180	...	6
Meagher	...	916	1,027	995	959	955	977	960	1,006	1,021	...	49
Park	...	4,470	6,498	6,219	6,143	6,019	5,977	6,240	6,310	6,341	...	13
Wage & Salary Jobs /b												
Region	...	14,202	22,932	22,752	23,301	23,817	24,169	24,855	25,153	25,022	...	6
Gallatin	...	10,240	17,213	17,290	17,955	18,650	19,204	19,784	20,050	19,977	...	6
Meagher	...	632	707	685	668	656	657	620	657	661	...	47
Park	...	3,330	5,012	4,777	4,678	4,511	4,308	4,451	4,446	4,384	...	14
Unemployment Rate /c												
Region	...	3.3%	4.6%	6.3%	6.1%	7.3%	7.4%	5.6%	5.7%	6.6%	6.3%	1
Gallatin	...	2.7%	4.5%	6.2%	5.5%	6.3%	6.4%	4.8%	5.0%	6.0%	5.7%	18
Meagher	...	3.8%	3.9%	5.4%	6.5%	9.2%	11.7%	13.1%	8.9%	8.6%	8.4%	37
Park	...	4.6%	5.3%	7.1%	8.3%	10.8%	10.6%	7.5%	7.8%	9.0%	8.6%	38
Total Personal Income (\$1000s) /b												
Region	286,130	361,540	665,698	659,600	679,128	681,681	704,058	733,860	742,162	759,885	752,000	7
Gallatin	179,664	248,202	474,198	478,270	492,505	500,563	523,057	550,263	559,436	566,663	...	6
Meagher	19,053	18,517	27,007	23,805	24,870	23,507	22,793	21,351	19,261	25,044	...	49
Park	87,413	94,822	164,493	157,525	161,752	157,611	157,587	162,247	163,406	168,178	...	13
Per Capita Personal Income /b												
Region	6,895	7,928	11,623	11,318	11,449	11,254	11,458	11,752	11,702	11,840	11,900	7
Gallatin	6,964	7,762	11,288	11,107	11,259	11,115	11,478	11,768	11,715	11,552	...	23
Meagher	7,328	8,528	11,742	11,016	11,377	10,517	9,816	9,531	8,934	11,819	...	41
Park	6,673	8,280	12,687	12,063	12,083	11,851	11,670	12,066	12,096	12,930	...	16
Nonfarm Earnings (\$1000s) /b												
Region	179,376	243,247	451,499	432,038	432,941	440,950	449,455	475,158	478,826	473,267	463,000	7
Gallatin	116,744	177,580	332,027	319,487	323,066	336,861	346,553	367,657	374,793	369,622	...	8
Meagher	9,760	8,429	11,420	10,382	9,891	9,475	9,886	9,447	9,445	9,336	...	48
Park	52,872	57,238	108,053	102,168	99,985	94,614	93,016	98,054	94,587	94,309	...	14
Farm Earnings (\$1000s) /b												
Region	32,916	29,487	29,922	29,856	25,717	10,827	12,019	15,821	12,754	31,548	33,000	7
Gallatin	18,010	12,617	12,897	19,005	15,146	6,947	8,860	12,642	12,258	20,939	...	2
Meagher	4,044	5,445	7,978	5,314	5,697	3,125	1,821	1,503	(391)	5,377	...	34
Park	10,862	11,425	9,047	5,536	4,873	755	1,338	1,676	887	5,232	...	35
Property Income (\$1000s) /b												
Region	53,435	63,568	122,836	128,053	145,942	149,492	156,806	160,926	165,089	165,261	167,000	5
Gallatin	33,501	42,956	85,909	90,625	104,797	105,007	112,424	116,410	116,692	116,979	...	5
Meagher	3,970	3,378	4,800	5,084	5,686	6,749	6,589	6,444	6,534	6,507	...	49
Park	15,964	17,234	32,127	32,344	35,458	37,736	37,792	38,072	41,862	41,775	...	12
Transfer Payments (\$1000s) /b												
Region	25,424	39,100	84,442	91,480	98,711	105,796	112,488	113,095	119,087	124,239	125,000	7
Gallatin	15,209	25,424	59,791	65,341	67,948	71,478	76,539	76,904	81,156	84,813	...	7
Meagher	1,698	2,081	3,530	3,655	4,295	4,920	5,317	4,784	4,646	4,835	...	46
Park	8,517	11,594	21,120	22,483	26,468	29,398	30,633	31,406	33,284	34,591	...	13

/a U.S. Bureau of the Census

/b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average)

/p 1987 data consists of preliminary estimates.

INDUSTRY	SIC** CODE	1986	1987	CHANGE	PERCENT CHANGE
Total Wage and Salary Employment		20,477	20,227	(250)	-1.2%
Total Private		15,269	15,088	(181)	-1.2%
Agriculture, Forestry, Fishing, Hunting, & Trapping		E 288	E 283	E (5)	E -1.7%
Agricultural Production--Crops ***	01	39	21	(18)	-46.2%
Agricultural Production--Livestock ***	02	166	182	16	9.6%
Agricultural Services	07	83	80	(3)	-3.6%
Forestry	08	"0"	"0"	"0"	"0"
Fishing, Hunting, and Trapping	09				
*Mining		227	154	(73)	-32.2%
Metal Mining	10	83	13	(70)	-84.3%
Coal Mining	12				
Oil and Gas Extraction	13	14	1	(13)	-92.9%
Mining of Non-Metallic Minerals, Except Fuels	14	129	138	9	7.0%
Construction		887	728	(159)	-17.9%
General Building Contractors	15	438	331	(107)	-24.4%
Heavy Construction Contractors	16	55	37	(18)	-32.7%
Special Trade Contractors	17	392	356	(36)	-9.2%
Manufacturing		1,430	1,370	(60)	-4.2%
Food and Kindred Products	20	221	200	(21)	-9.5%
Textile Mill Products	22				
Apparel and Other Textile Products	23	15	23	8	53.3%
Lumber and Wood Products	24	474	452	(22)	-4.6%
Furniture and Fixtures	25	"0"	"0"	"0"	"0"
Paper and Allied Products	26	"0"	"0"	"0"	"0"
Printing and Publishing	27	228	234	6	2.6%
Chemicals and Allied Products	28	"0"	"0"	"0"	"0"
Petroleum Refining and Related Industries	29				
Rubber and Miscellaneous Plastic Products	30	"0"	53	"0"	"0"
Leather and Leather Products	31	24	3	(21)	-87.5%
Stone, Clay, Glass, and Concrete Products	32	169	155	(14)	-8.3%
Primary Metals Processing	33	13	14	1	7.7%
Fabricated Metal Products	34	49	47	(2)	-4.1%
Machinery, Except Electrical	35	8	"0"	"0"	"0"
Electrical and Electronic Equipment	36	53	49	(4)	-7.5%
Transportation Equipment	37	3	"0"	"0"	"0"
Instruments and Related Products	38	"0"	21	"0"	"0"
Miscellaneous Manufacturing Industries	39	77	58	(19)	-24.7%
Transportation and Public Utilities		900	904	4	0.4%
Local and Interurban Passenger Transit	41	115	116	1	0.9%
Trucking and Warehousing	42	322	323	1	0.3%
Water Transportation	44				
Transportation by Air	45	51	72	21	41.2%
Pipelines, Except Natural Gas	46				
Transportation Services	47	40	44	4	10.0%
Communications	48	188	170	(18)	-9.6%
Electric, Gas, and Sanitary Services	49	181	174	(7)	-3.9%
Wholesale Trade		817	830	13	1.6%
Durable Goods	50	491	488	(3)	-0.6%
Nondurable Goods	51	326	342	16	4.9%
Retail Trade		5,169	5,136	(33)	-0.6%
Building Materials and Hardware	52	270	242	(28)	-10.4%
General Merchandise Stores	53	419	454	35	8.4%
Food Stores	54	593	605	12	2.0%
Automotive Dealers and Service Stations	55	621	599	(22)	-3.5%
Apparel and Accessory Stores	56	205	201	(4)	-2.0%
Furniture and Home Furnishings Stores	57	205	189	(16)	-7.8%
Eating and Drinking Places	58	2,241	2,201	(40)	-1.8%
Miscellaneous Retail	59	606	639	33	5.4%
Finance, Insurance, and Real Estate		950	953	3	0.3%
Banking	60	428	409	(19)	-4.4%
Credit Agencies other than Banks	61	96	94	(2)	-2.1%
Security, Commodity Brokers, and Services	62	33	27	(6)	-18.2%
Insurance Carriers	63	73	60	(13)	-17.8%
Insurance Agents, Brokers, and Services	64	107	115	8	7.5%
Real Estate	65	196	230	34	17.3%
Combined Real Estate, Insurance, Etc.	66				
Holding and Other Investment Offices	67	11	13	2	18.2%
Services		E 4,556	E 4,684	E 128	E 2.8%
Hotels and Other Lodging Places	70	1,254	1,201	(53)	-4.2%
Personal Services	72	214	212	(2)	-0.9%
Business Services	73	457	603	146	31.9%
Auto Repair, Services, and Garages	75	169	160	(9)	-5.3%
Miscellaneous Repair Services	76	68	75	7	10.3%
Motion Pictures	78	81	78	(3)	-3.7%
Amusement and Recreation Services	79	288	302	14	4.9%
Private Health Services	80	1,287	1,332	45	3.5%
Legal Services	81	144	148	4	2.8%
Private Educational Services	82	57	50	(7)	-12.3%
Private Social Services	83	216	247	31	14.4%
Museums, Art Galleries, Etc.	84	"0"	"0"	"0"	"0"
Membership Organizations Including Tribal Gov't	86	107	101	(6)	-5.6%
Private Households	88	23	30	7	30.4%
Engineering, Accounting, and Other Services	89	191	145	(46)	-24.1%
Non-Classifiable	99	3	3	0	0.0%
Government		5,206	5,139	(67)	-1.3%
State		2,512	2,446	(66)	-2.6%
Local		2,084	2,055	(29)	-1.4%
Federal		607	636	29	4.8%

*Includes only employment covered by the Unemployment Insurance Program.

**Standard Industrial Classification

***These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.20

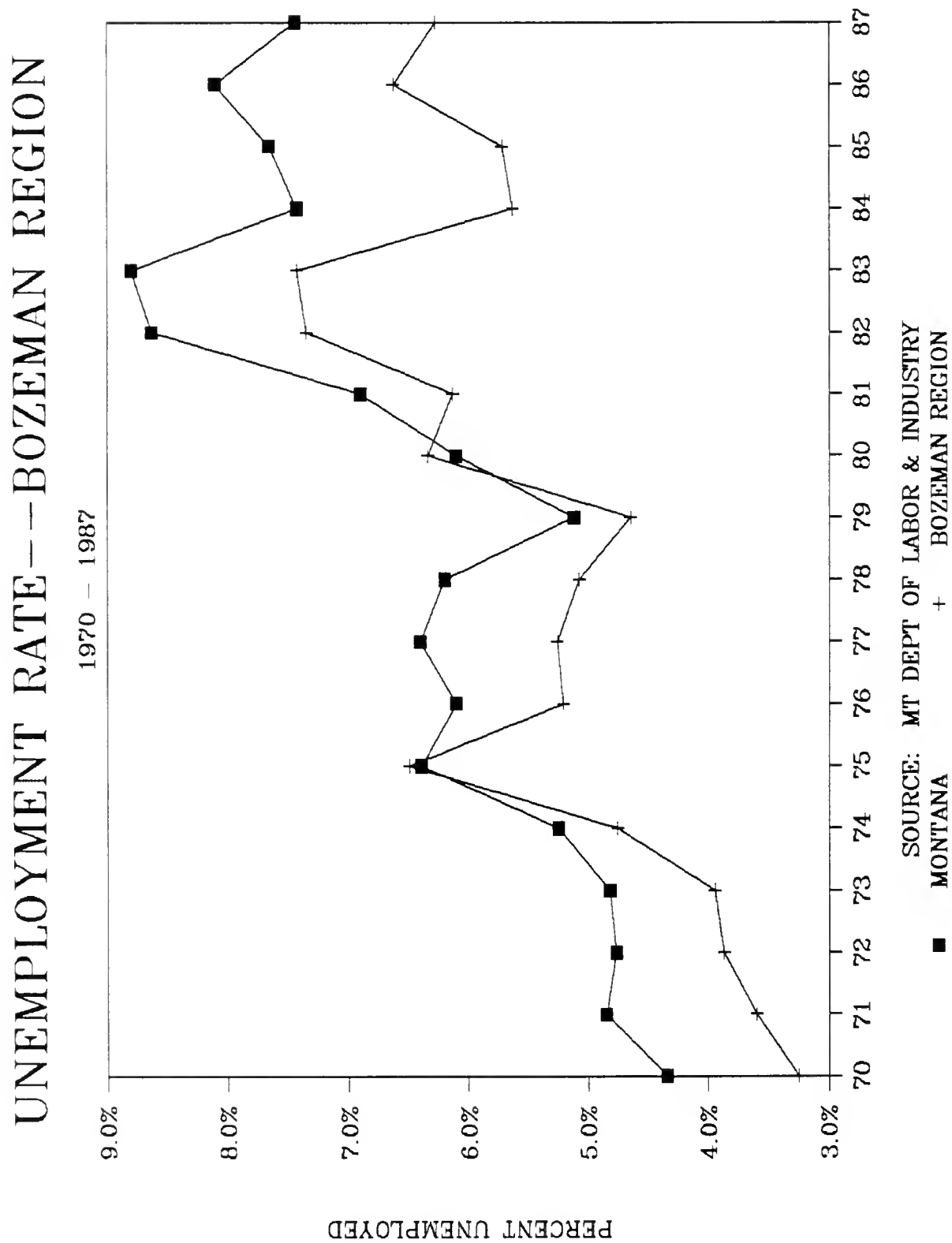
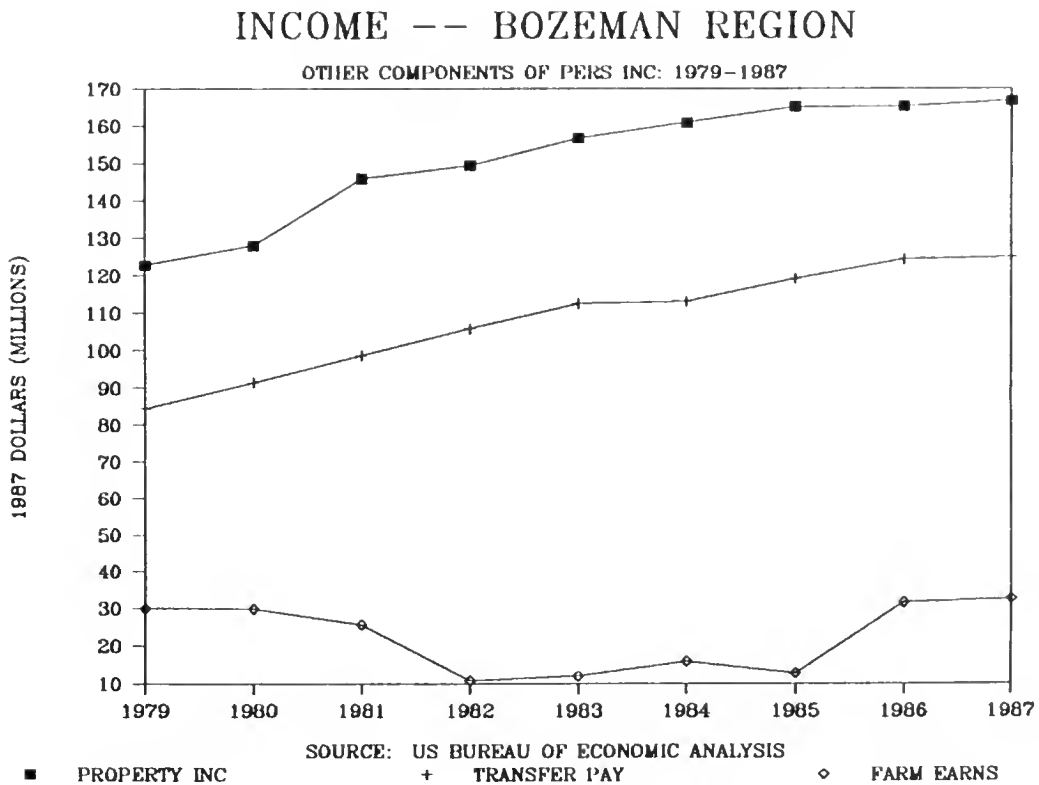
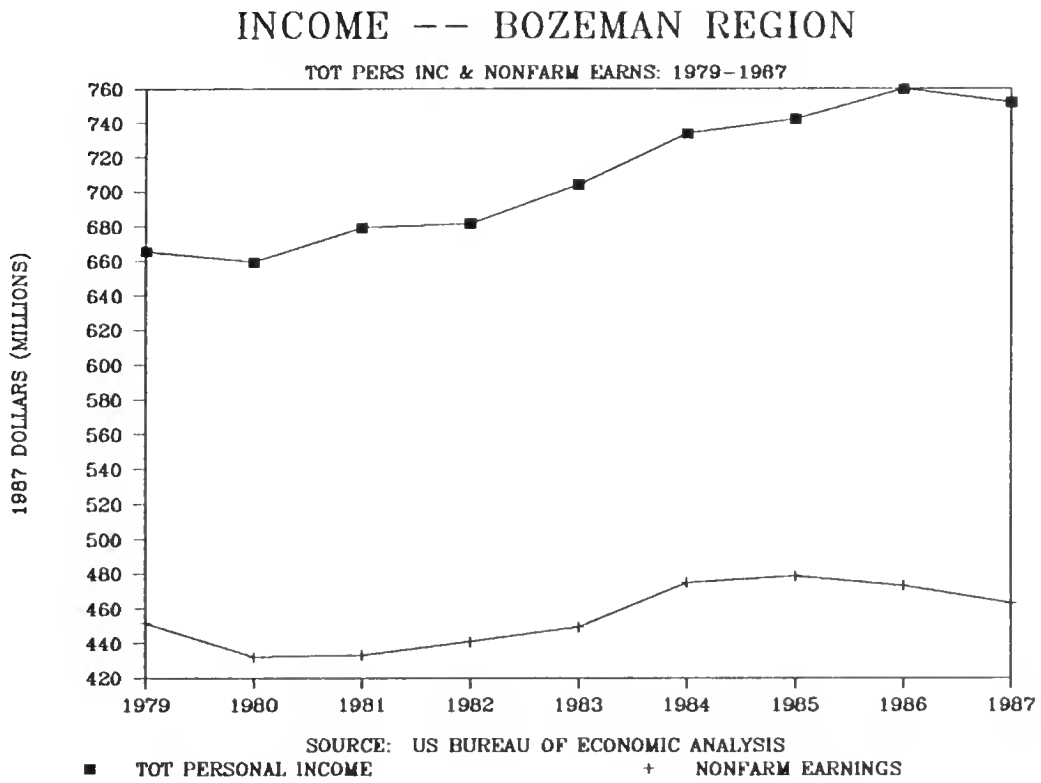


Figure 2.21



The Butte Region

The Butte Region of southwest Montana includes Beaverhead, Deer Lodge, Granite, Madison, Powell, and Silver Bow counties.

Labor Force

A marked decline in the total number of jobs characterized the Butte Region from 1974 to 1985. With approximately 30,600 total jobs and 23,500 wage/salary jobs in 1986, the region ranked seventh in both categories. About half the jobs were located in the region's most populous county, Silver Bow, and the other half were distributed fairly evenly among the other five counties (Table 2.22).

Employment in the region has been unstable since 1969, primarily because of volatility in metal mining and related industries. After peaking in 1974, both total jobs and wage/salary jobs declined with few respites (1978, 1979, and 1981) until 1984–1985. By 1986, however, both total jobs and wage/salary jobs had begun to recover slightly. Recovery continued for wage/salary jobs into 1987 with an increase of 1.9 percent, or 370 jobs, for the region (Table 2.22).

Wage/salary jobs declined by 13 percent between 1979 and 1986, the third largest percentage decline in the state (Table 2.5). A 23 percent increase (less than the state's average of 30 percent) in the number of self-employed softened the impact of the region's dramatic wage/salary job loss, but was insufficient to offset a decline in the total number of jobs, which decreased by 7 percent between 1979 and 1986.

The region's significant industries have changed over time, with the exception of government, which always has provided a considerable share of total jobs. In 1969, mining and manufacturing together accounted for nearly 25 percent of wage/salary employment in the region. By 1986, this share decreased to less than 10 percent, largely a result of the decrease in employment and subsequent closure of the Anaconda Company's metal mining and processing facilities. Industries that expanded to fill this gap included retail trade and services, growing from a combined share of 30 percent to 41 percent of the wage/salary employment between 1969 and 1986.

Within retail trade and services, growth occurred in areas such as private health and social services, business services, hotels/motels, and eating/drinking places. During 1987, strong growth in metal mining, retail trade (particularly eating/drinking places), and private services offset declines in construction, local government, and wholesale trade. As a result, wage/salary jobs increased by 1.9 percent, a rate significantly greater than the statewide average of 0.2 percent (Table 2.23).

In the mid-1970s, the closing of the underground metal mining operations raised the unemployment rate of the Butte Region to a level above the statewide average that has persisted to the present (Figure 2.24). Trends in the statewide unemployment rate appeared with regularity in the unemployment

rate of the Butte Region, though often in exaggerated form. In 1987, the regional unemployment rate ranked 10th in the state, and in previous years the ranking was lower (i.e. 11th or even last). In 1983, the region's unemployment rate peaked at 11.8 percent, the worst in the state, with Deer Lodge and Silver Bow counties exhibiting very high rates of 17.1 and 13.5 percent. By 1987, however, the regional rate of 8.3 percent was closer to the statewide average of 7.4 percent.

Population

Historically, the Butte Region had been the most populous region in the state (Table 2.8). By 1950, however, the region's population began to decline, and in 1987, ranked fifth. Since peaking in 1920, population has declined in almost every decade, with the only exception occurring during the strong statewide growth of the 1950s.

As with unemployment, 1975 represents a turning point in the region's population. Figure 2.23 illustrates the region's population gradually creeping upward until 1975, and then falling off abruptly and declining steadily ever since. In terms of population growth, the region ranks last, whether growth is measured between 1969 and 1987 (a decline of 17 percent) or between 1979 and 1987 (a decline of 11 percent). Instability in the job market reflected by high unemployment rates and a declining trend in both total and wage/salary jobs has contributed a great deal to the region's loss of population (Figures 2.22 and 2.24). If the turnaround in jobs since 1984-1985 continues, however, confidence in the region's job market will return, and renewed growth in population may follow.

Income

The Butte Region ranked fifth in total personal income in 1986, reflecting similar ranking for its components, and close to the rankings for population and total jobs (Table 2.22). Just over half of this income was located in Silver Bow County.

Changes in total personal income and its components were influenced strongly by the declines in total and wage/salary jobs that occurred between 1979 and 1987. Therefore, the pattern of change for total personal income in Figure 2.25 is noticeably different from that for the state, shown in Figure 2.11. Between 1979 and 1986, total personal income declined by 7 percent in the Butte Region, the largest decline in the state. However, the decline was not uniform throughout the region, as Table 2.22 shows, and both Beaverhead and Powell counties experienced increases in personal income. Also of note is the fact that income basically has increased since 1985.

The decline in total personal income primarily was due to a general decline in nonfarm earnings (Figure 2.25). This decline closely followed the decline in wage/salary jobs that occurred after 1979 (Figure 2.22). In addition, the recovery in wage/salary jobs that occurred in 1986 and 1987 was paralleled by slight growth in nonfarm earnings in these same years.

Total growth in transfer payments and property income in the region was similar to that of the state, except for a slight decline in property income that occurred between 1984 and 1987. More interesting, however, is the relative size of transfer payments and property income. Unlike the statewide experience, the transfer payments component of personal income in the Butte Region was consistently larger than the property income component between 1979 and 1987. Table 2.22 reveals that this switchover occurred sometime during the 1970s.

Regional farm earnings ranked ninth in the state in 1986, reflecting the urban nature of Silver Bow County (which ranked last in farm earnings) and the generally mountainous terrain of the region. Growth of regional farm earnings was similar to growth statewide, with very poor performance between 1981 and 1985. Recovery in 1986 provided a welcome boost to total personal income, and farm earnings remained basically unchanged during 1987.

The Butte Region ranked fifth in per capita income for the 1982-1986 period, supported by strong performance in Silver Bow County, which ranked fifth among Montana's counties. Compared to the state average, per capita income in the region has been slightly lower than average since 1979.

Between 1979 and 1985, changes in per capita income closely followed changes in total personal income. In 1986 and 1987, however, declines in population accompanied by a large increase in the farm earnings component of personal income created a surge in per capita income for both the region and the state (Tables 2.15 and 2.22).

Figure 2.22

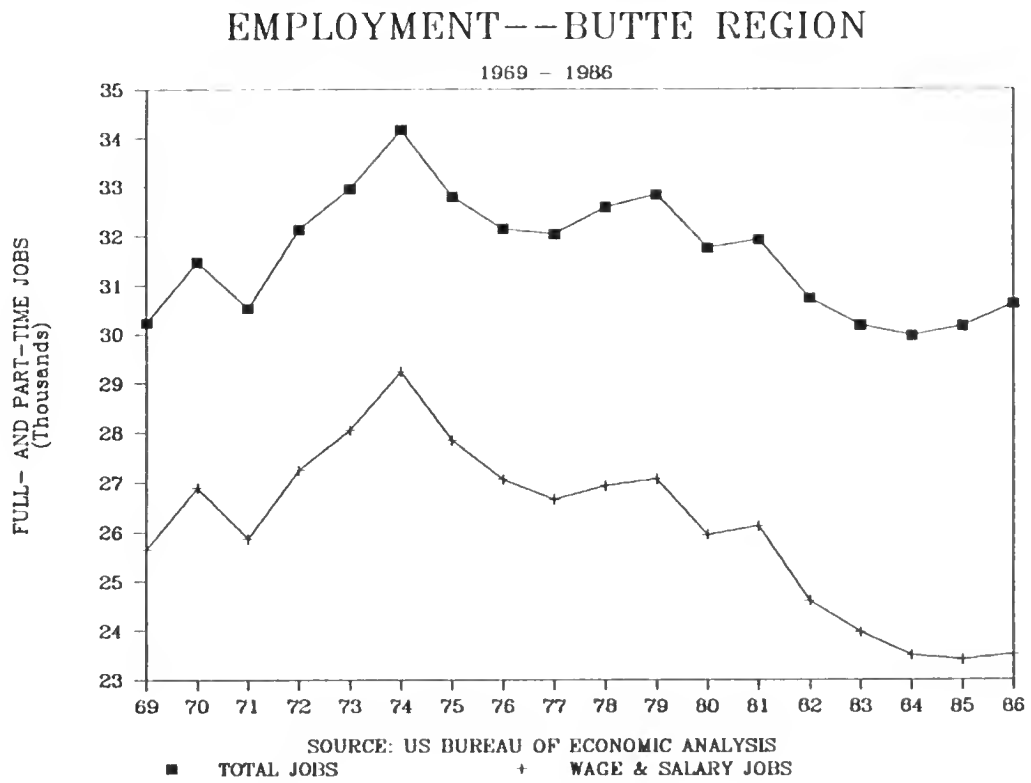


Figure 2.23

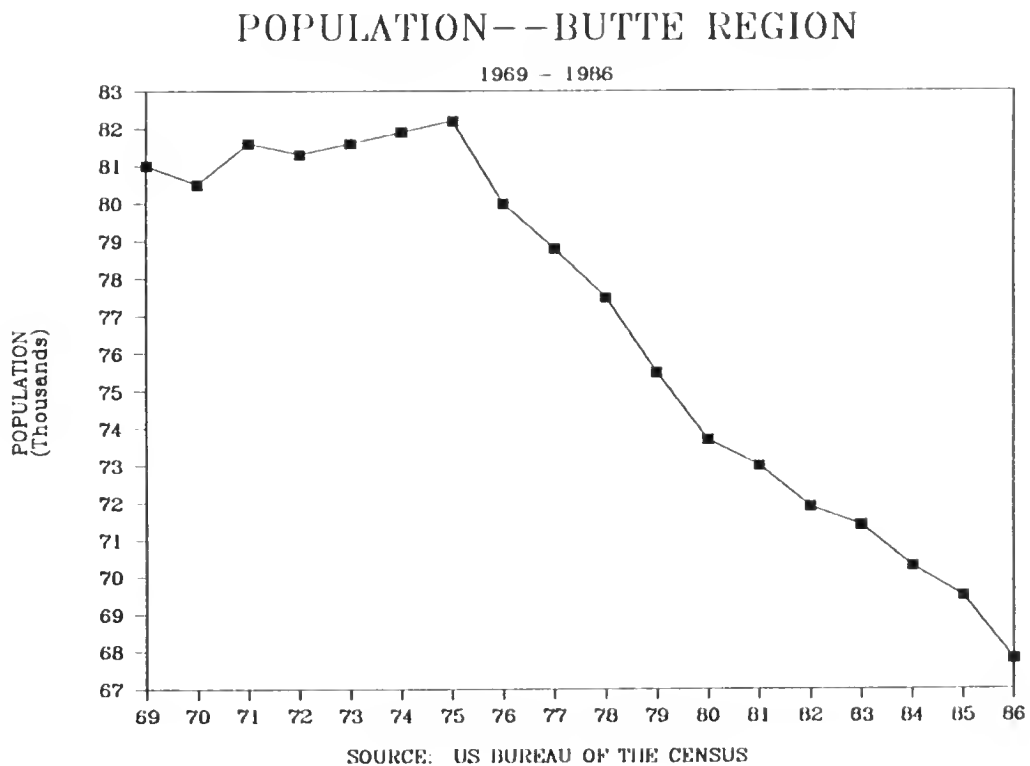


Table 2.22

The Butte Region												Rank in State /d (Region or County)
	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986	1987 /p	
Population /a												
Region	86,800	81,000	75,500	73,700	73,000	71,900	71,400	70,300	69,500	67,800	67,200	5
Beaverhead	7,100	8,100	7,900	8,200	8,300	8,500	8,700	8,500	8,500	8,400	8,400	25
Deer Lodge	18,500	15,900	12,900	12,400	12,000	11,600	11,400	11,200	11,000	10,200	10,000	21
Granite	3,000	2,800	2,700	2,700	2,700	2,600	2,700	2,700	2,700	2,700	2,700	42
Madison	5,200	5,000	5,500	5,500	5,700	5,800	5,800	5,900	5,800	5,700	5,700	33
Powell	8,900	6,700	7,200	6,900	6,900	6,800	6,800	6,800	6,900	6,900	6,900	28
Silver Bow	46,100	42,500	39,300	38,000	37,400	36,600	36,000	35,200	34,600	33,900	33,700	7
Total Jobs /b												
Region	...	30,240	32,840	31,756	31,927	30,730	30,183	29,963	30,159	30,617	...	7
Beaverhead	...	3,243	3,875	3,891	3,864	4,004	4,079	4,125	4,121	4,276	...	22
Deer Lodge	...	5,819	4,694	4,067	3,741	3,431	3,532	3,657	3,660	3,631	...	23
Granite	...	1,103	1,128	1,133	1,131	1,144	1,168	1,228	1,195	1,225	...	46
Madison	...	2,238	2,653	2,656	2,775	2,954	2,885	2,868	2,892	3,005	...	31
Powell	...	2,569	3,065	2,951	2,843	2,959	3,010	3,015	3,068	3,052	...	28
Silver Bow	...	15,264	17,425	17,038	17,553	16,238	15,509	15,070	15,237	15,428	...	7
Wage & Salary Jobs /b												
Region	...	25,666	27,071	25,944	26,118	24,608	23,967	23,493	23,405	23,503	...	7
Beaverhead	...	2,451	2,860	2,923	2,929	2,989	3,001	2,986	2,935	3,027	...	21
Deer Lodge	...	5,358	4,101	3,497	3,131	2,865	2,945	3,060	3,019	2,967	...	22
Granite	...	754	688	690	685	675	695	744	702	713	...	45
Madison	...	1,418	1,653	1,668	1,787	1,844	1,776	1,735	1,803	...	31	
Powell	...	2,054	2,380	2,273	2,181	2,266	2,311	2,311	2,347	2,299	...	24
Silver Bow	...	13,631	15,389	14,893	15,405	13,989	13,239	12,651	12,667	12,694	...	7
Unemployment Rate /c												
Region	...	3.9%	5.8%	6.7%	8.7%	10.6%	11.8%	9.8%	8.8%	9.0%	8.3%	10
Beaverhead	...	3.9%	3.7%	3.8%	4.1%	6.0%	6.5%	5.3%	6.0%	5.8%	5.4%	13
Deer Lodge	...	2.4%	7.0%	9.5%	17.0%	15.1%	17.1%	11.9%	10.8%	11.0%	9.6%	47
Granite	...	6.2%	7.7%	7.7%	8.9%	11.8%	11.0%	8.5%	13.1%	11.0%	8.8%	39
Madison	...	5.0%	3.0%	4.6%	4.6%	7.0%	8.6%	5.5%	4.4%	5.7%	6.3%	21
Powell	...	4.8%	5.6%	4.3%	8.3%	10.1%	7.9%	8.7%	8.0%	7.4%	7.8%	34
Silver Bow	...	3.9%	4.2%	6.8%	8.3%	11.3%	13.5%	11.8%	9.7%	10.2%	9.2%	45
Total Personal Income (\$1000s) /b												
Region	625,418	874,172	889,760	845,600	874,873	840,734	834,105	812,057	802,394	827,035	824,000	5
Beaverhead	55,466	48,433	97,287	90,198	95,090	92,930	91,838	91,142	90,081	99,231	...	24
Deer Lodge	108,911	118,465	138,262	123,630	117,894	109,470	111,153	111,472	109,931	109,938	...	22
Granite	21,913	20,152	31,816	29,936	29,848	27,303	29,757	29,200	28,107	29,443	...	48
Madison	30,719	39,400	60,266	60,349	62,401	55,932	56,131	58,274	59,695	65,830	...	35
Powell	50,253	53,667	75,713	71,809	72,628	72,621	73,259	73,479	74,741	78,518	...	31
Silver Bow	358,156	374,055	486,416	469,679	496,811	482,478	471,968	448,091	439,838	446,076	...	7
Per Capita Personal Income /b												
Region	7,205	8,317	11,771	11,464	11,978	11,692	11,662	11,561	11,528	12,199	12,300	5
Beaverhead	7,812	8,435	12,285	10,981	11,449	10,879	10,593	10,743	10,631	11,754	...	33
Deer Lodge	5,847	7,435	10,685	9,956	9,833	9,441	9,729	9,990	9,951	10,827	...	44
Granite	7,304	7,281	11,705	11,067	10,982	10,319	10,960	10,775	10,269	10,909	...	37
Madison	5,907	7,814	11,981	10,977	10,968	9,712	9,605	9,948	10,338	11,557	...	39
Powell	7,283	8,001	10,543	10,338	10,555	10,729	10,704	10,828	10,781	11,109	...	35
Silver Bow	7,769	8,802	12,225	12,567	13,270	13,184	13,101	12,728	12,697	13,152	...	5
Nonfarm Earnings (\$1000s) /b												
Region	450,271	484,127	590,370	546,297	553,219	517,339	509,521	481,687	476,454	478,267	479,000	6
Beaverhead	27,278	35,457	52,652	52,020	50,090	50,906	52,954	53,469	53,330	55,092	...	23
Deer Lodge	95,356	96,104	96,673	76,970	66,319	55,901	58,449	59,202	59,716	56,689	...	22
Granite	12,649	11,399	11,855	11,107	11,018	10,542	12,673	13,200	11,767	11,501	...	46
Madison	11,761	18,251	26,295	24,480	25,530	25,611	24,992	25,222	25,777	26,984	...	35
Powell	28,362	36,007	45,276	41,579	40,403	43,618	44,536	45,451	47,156	44,347	...	24
Silver Bow	274,665	286,908	357,820	340,142	359,840	330,762	315,916	285,143	278,728	283,653	...	7
Farm Earnings (\$1000s) /b												
Region	37,308	31,872	40,532	26,338	26,803	10,446	6,140	7,876	6,978	25,652	25,000	9
Beaverhead	11,924	13,949	15,581	9,169	13,799	8,946	4,550	4,229	2,808	9,630	...	17
Deer Lodge	1,273	2,078	1,927	1,788	870	629	526	760	561	1,449	...	53
Granite	5,453	2,783	5,309	3,809	2,943	1,040	657	857	957	3,008	...	49
Madison	9,101	8,960	11,771	7,846	6,626	1,464	1,050	2,289	2,936	7,805	...	23
Powell	8,813	3,329	5,298	3,026	2,759	(926)	(1,116)	(831)	(1,023)	3,089	...	48
Silver Bow	744	772	646	700	(195)	(505)	473	552	739	671	...	56
Property Income (\$1000s) /b												
Region	86,732	95,854	134,713	139,080	155,277	166,407	181,394	186,027	161,947	160,289	154,000	6
Beaverhead	12,438	12,752	21,269	21,053	22,364	23,753	24,171	23,333	22,468	22,405	...	23
Deer Lodge	11,025	12,518	14,591	15,833	18,178	19,372	19,145	20,935	19,489	19,519	...	27
Granite	2,212	2,856	5,859	5,847	6,513	7,114	7,245	6,432	7,033	7,025	...	46
Madison	4,278	7,645	17,516	17,715	19,019	18,043	18,119	18,417	18,465	18,391	...	28
Powell	6,663	7,220	12,868	14,329	16,479	17,060	16,566	16,349	16,071	16,022	...	33
Silver Bow	48,114	52,883	62,210	64,302	72,724	81,065	76,148	80,161	78,420	76,928	...	7
Transfer Payments (\$1000s) /b												
Region	86,583	92,015	162,416	169,271	178,138	184,688	194,843	193,723	196,775	204,054	205,000	5
Beaverhead	5,039	7,604	14,204	14,897	15,150	16,226	17,344	17,463	18,798	19,933	...	24
Deer Lodge	11,125	16,334	28,643	30,604	32,765	32,711	34,514	34,166	34,703	35,587	...	12
Granite	1,913	2,976	5,157	5,456	5,938	6,318	6,482	6,435	6,715	6,848	...	41
Madison	3,382	5,036	9,683	9,589	10,669	10,437	11,654	12,134	12,399	12,790	...	33
Powell	5,475	7,476	13,458	14,151	14,885	15,871	16,159	16,005	16,555	16,772	...	26
Silver Bow	39,250	52,589	91,268	94,773	98,931	102,927	108,491	107,520	107,605	112,125	...	4

/a U.S. Bureau of the Census

/b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Data for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average)

/p 1987 data consists of preliminary estimates.

Table 2.23

WAGE & SALARY EMPLOYMENT IN THE BUTTE REGION*: 1986-1987

INDUSTRY	SIC** CODE	1986	1987	CHANGE	PERCENT CHANGE
Total Wage and Salary Employment		19,818	20,185	367	1.9%
Total Private		14,287	14,700	413	2.9%
Agriculture, Forestry, Fishing, Hunting, & Trapping		331	337	6	1.8%
Agricultural Production--Crops ***	01	"0"	16	"0"	"0"
Agricultural Production--Livestock ***	02	261	263	2	0.8%
Agricultural Services	07	50	55	5	10.0%
Forestry	08	"0"	"0"	"0"	"0"
Fishing, Hunting, and Trapping	09	"0"	"0"	"0"	"0"
Mining		E 694	E 855	E 161	E 23.2%
Metal Mining	10	232	433	201	86.6%
Coal Mining	12	"0"	"0"	"0"	"0"
Oil and Gas Extraction	13	13	37	24	184.6%
Mining of Non-Metallic Minerals, Except Fuels	14	449	385	(64)	-14.3%
Construction		632	489	(143)	-22.6%
General Building Contractors	15	205	147	(58)	-28.3%
Heavy Construction Contractors	16	198	166	(32)	-16.2%
Special Trade Contractors	17	224	171	(53)	-23.7%
Manufacturing		1,108	1,136	28	2.5%
Food and Kindred Products	20	141	120	(21)	-14.9%
Textile Mill Products	22	"0"	"0"	"0"	"0"
Apparel and Other Textile Products	23	"0"	"0"	"0"	"0"
Lumber and Wood Products	24	400	467	67	16.8%
Furniture and Fixtures	25	"0"	"0"	"0"	"0"
Paper and Allied Products	26	"0"	"0"	"0"	"0"
Printing and Publishing	27	172	187	15	8.7%
Chemicals and Allied Products	28	"0"	"0"	"0"	"0"
Petroleum Refining and Related Industries	29	"0"	"0"	"0"	"0"
Rubber and Miscellaneous Plastic Products	30	"0"	"0"	"0"	"0"
Leather and Leather Products	31	"0"	"0"	"0"	"0"
Stone, Clay, Glass, and Concrete Products	32	29	22	(7)	-24.1%
Primary Metals Processing	33	"0"	"0"	"0"	"0"
Fabricated Metal Products	34	51	45	(6)	-11.8%
Machinery, Except Electrical	35	"0"	12	"0"	"0"
Electrical and Electronic Equipment	36	"0"	"0"	"0"	"0"
Transportation Equipment	37	"0"	"0"	"0"	"0"
Instruments and Related Products	38	"0"	"0"	"0"	"0"
Miscellaneous Manufacturing Industries	39	27	22	(5)	-18.5%
Transportation and Public Utilities		1,570	"0"	"0"	"0"
Local and Interurban Passenger Transit	41	112	103	(9)	-8.0%
Trucking and Warehousing	42	208	209	1	0.5%
Water Transportation	44	"0"	"0"	"0"	"0"
Transportation by Air	45	"0"	15	"0"	"0"
Pipelines, Except Natural Gas	46	"0"	"0"	"0"	"0"
Transportation Services	47	26	28	2	7.7%
Communications	48	168	170	2	1.2%
Electric, Gas, and Sanitary Services	49	1,043	1,044	1	0.1%
Wholesale Trade		737	706	(31)	-4.2%
Durable Goods	50	290	273	(17)	-5.9%
Nondurable Goods	51	446	431	(15)	-3.4%
Retail Trade		3,690	3,928	238	6.4%
Building Materials and Hardware	52	138	134	(4)	-2.9%
General Merchandise Stores	53	234	237	3	1.3%
Food Stores	54	561	602	41	7.3%
Automotive Dealers and Service Stations	55	509	507	(2)	-0.4%
Apparel and Accessory Stores	56	115	116	1	0.9%
Furniture and Home Furnishings Stores	57	137	138	1	0.7%
Eating and Drinking Places	58	1,562	1,728	166	10.6%
Miscellaneous Retail	59	416	446	30	7.2%
Finance, Insurance, and Real Estate		E 770	E 743	E (27)	E -3.5%
Banking	60	311	297	(14)	-4.5%
Credit Agencies other Than Banks	61	101	107	6	5.9%
Security, Commodity Brokers, and Services	62	27	19	(8)	-29.6%
Insurance Carriers	63	67	59	(8)	-11.9%
Insurance Agents, Brokers, and Services	64	88	83	(5)	-5.7%
Real Estate	65	176	178	2	1.1%
Combined Real Estate, Insurance, Etc.	66	"0"	"0"	"0"	"0"
Holding and Other Investment Offices	67	"0"	"0"	"0"	"0"
Services		E 4,534	E 4,761	E 227	E 5.0%
Hotels and Other Lodging Places	70	716	780	64	8.9%
Personal Services	72	148	140	(8)	-5.4%
Business Services	73	536	590	54	10.1%
Auto Repair, Services, and Garages	75	115	127	12	10.4%
Miscellaneous Repair Services	76	28	29	1	3.6%
Motion Pictures	78	25	17	(8)	-32.0%
Amusement and Recreation Services	79	154	170	16	10.4%
Private Health Services	80	1,981	2,009	28	1.4%
Legal Services	81	144	155	11	7.6%
Private Educational Services	82	"0"	"0"	"0"	"0"
Private Social Services	83	294	340	46	15.6%
Museums, Art Galleries, Etc.	84	23	25	2	8.7%
Membership Organizations Including Tribal Gov't	86	185	190	5	2.7%
Private Households	88	32	34	2	6.3%
Engineering, Accounting, and Other Services	89	153	155	2	1.3%
Non-Classifiable	99	6	"0"	(6)	-100.0%
Government		5,529	5,483	(46)	-0.8%
State		2,004	2,007	3	0.1%
Local		2,698	2,615	(83)	-3.1%
Federal		823	854	31	3.8%

*Includes only employment covered by the Unemployment Insurance Program.

**Standard Industrial Classification

***These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.24

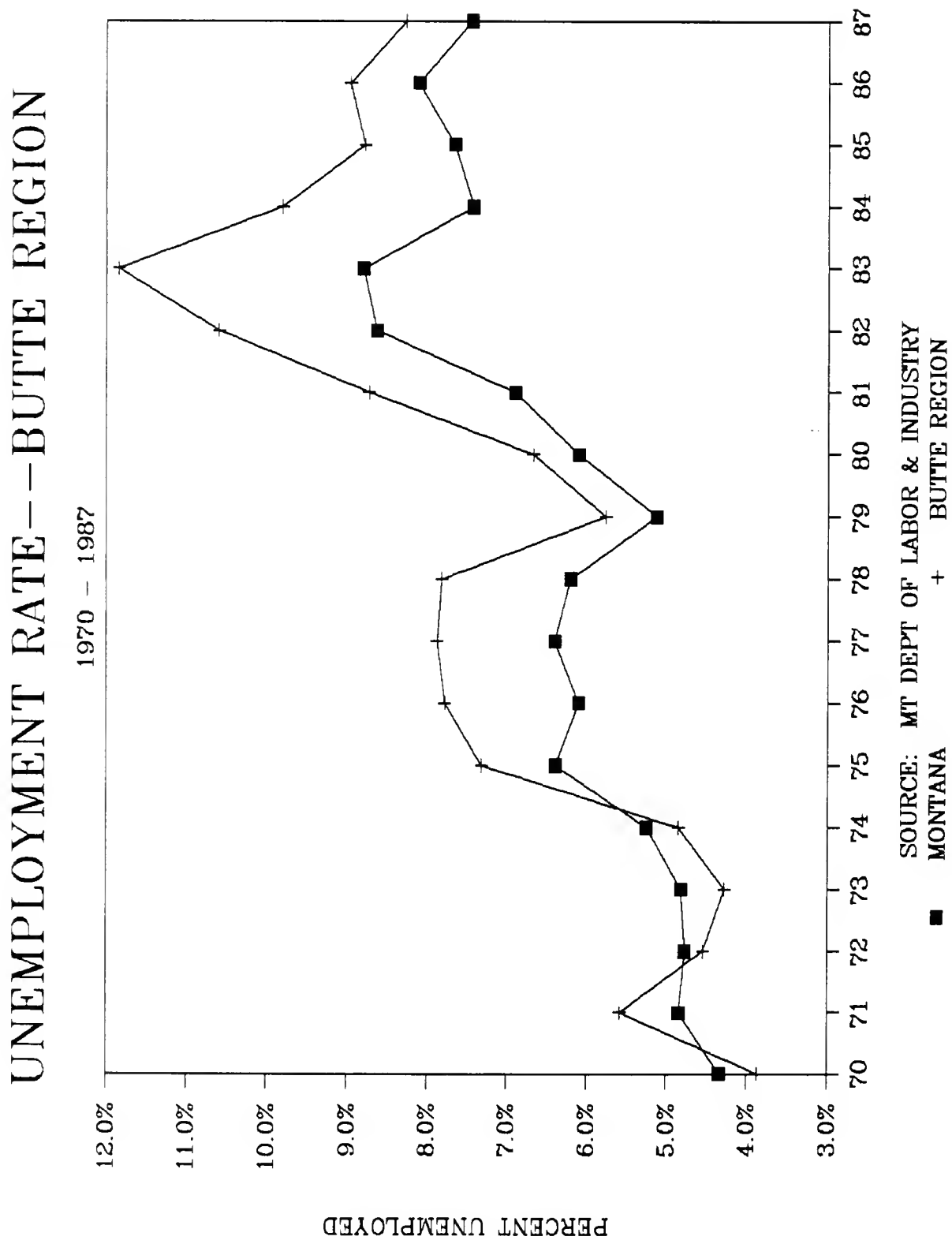
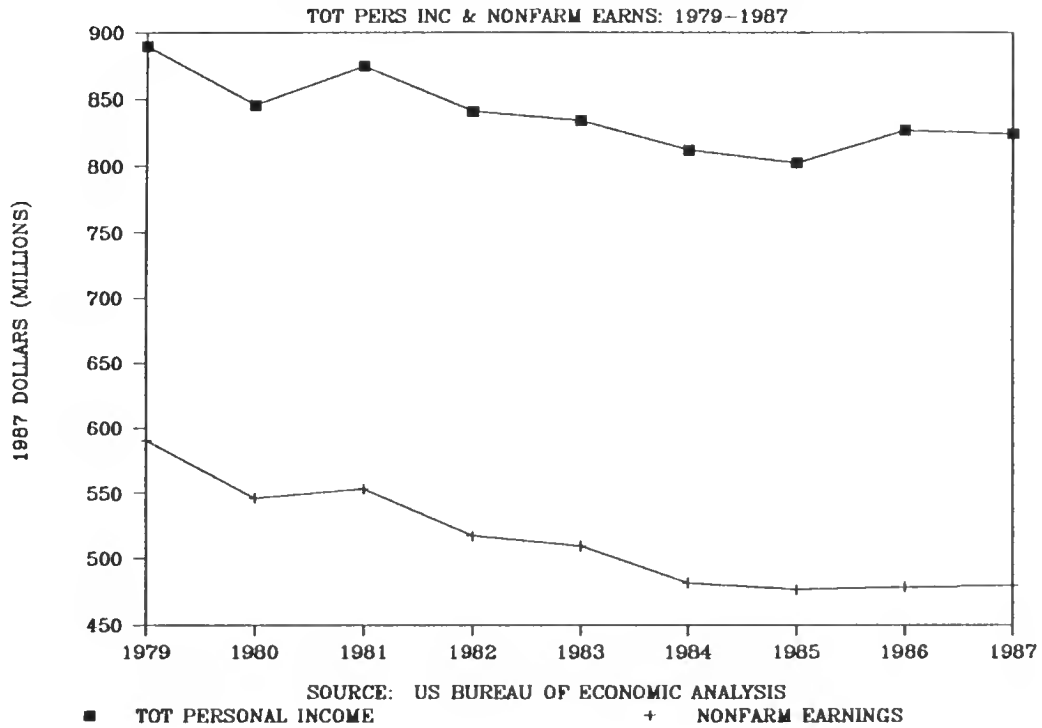
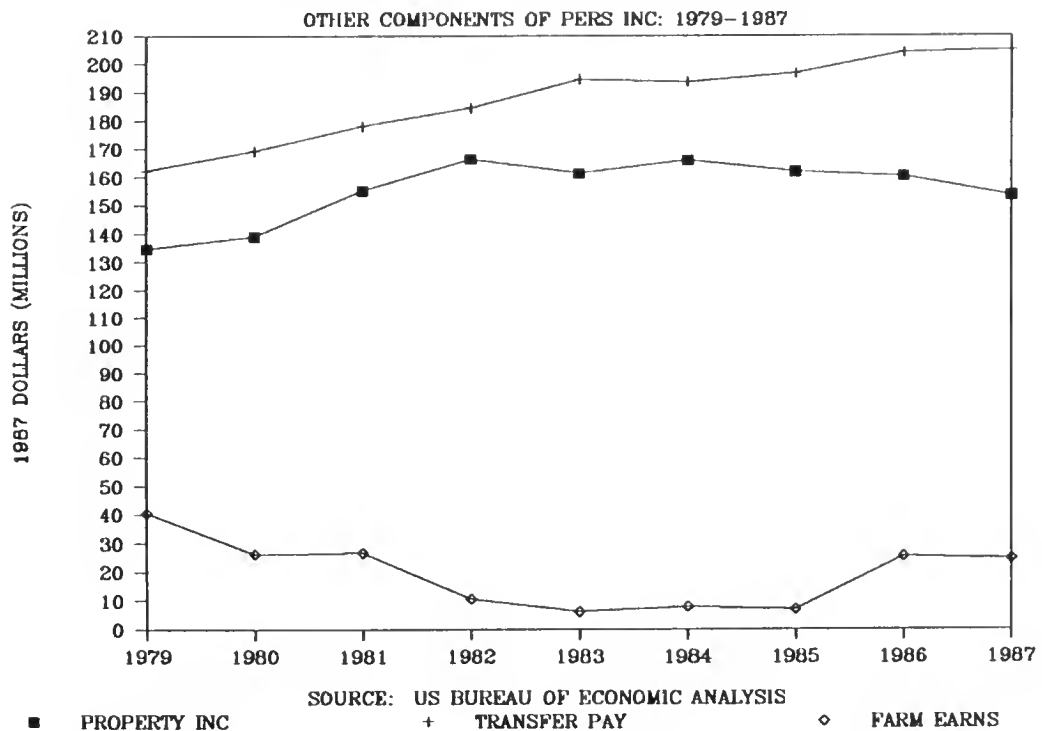


Figure 2.25

INCOME -- BUTTE REGION



INCOME -- BUTTE REGION



The Glasgow-Wolf Point Region

The Glasgow-Wolf Point Region, located in the northeast corner of the state, encompasses Daniels, Phillips, Roosevelt, Sheridan, and Valley counties.

Labor Force

The Glasgow-Wolf Point Region ranked ninth in the state in 1986 both in total jobs and in wage/salary jobs because the counties are among the least populated in the state (Table 2.24). Roosevelt and Valley counties, the two most populous counties, each contain about twice as many jobs as each of the other counties, with 5,400 and 4,600 jobs respectively.

Total jobs growth between 1969 and 1986 paralleled that of wage/salary jobs (Figure 2.26). During the early 1970s, steady growth led to a 1974 peak in total jobs. Sporadic performance after 1974 resulted in a general loss of jobs by 1986, with the largest declines coming after a 1981 peak in wage/salary jobs.

Between 1979 and 1986, wage/salary jobs declined by 8 percent, twice the statewide average decline of 4 percent. At the same time, the self-employed growth rate of 7.5 percent was the lowest in the state (Table 2.5). As a result, regional growth rate for total jobs remained well below the state average of 3 percent; in fact, it was negative from 1979 to 1986. The share of jobs held by the self-employed represents a significant portion of the region's employment: self-employment accounted for 35 percent of total jobs while the state average was only 26 percent. Contrary to the state trend of the self-employed holding an increasing share of jobs, this figure was down from 37 percent in 1969, reflecting a decrease in the number of self-employed between 1969 and 1979. The explanation for this regional decline involves the prominence of agriculture, a declining industry statewide.

In 1969, agriculture was the dominant industry in this region, accounting for 30 percent of the total jobs, with services, government, and retail trade trailing distantly. By 1986, however, a gradual and steady decline statewide in agriculture reduced its share to 22 percent, leaving it slightly behind services in terms of industry share and much closer to the government and retail trade shares. Within services, the largest employment components are private health services and membership organizations (including tribal government). Within the public services sector, local government, which includes school districts, is the largest employer. The largest manufacturing sector is apparel/other textiles products (A & S Tribal Industries).

Departure of military personnel from the Glasgow Air Force Base beginning in 1969 accompanied by a decline in the ordnance industry (military equipment and hardware) caused substantial regional job losses in the early 1970s. This loss was more than offset by growth in the service sectors, however, particularly in private business services where the Family Training Center in Valley County provided employment for several hundred. Declines since 1979 have spread throughout the region's economy, with all sectors except manufacturing, government, and finance/insurance/real estate declining between

1979 and 1986, and with growth in these industries ceasing between 1986 and 1987 (Table 2.25). Wage/salary employment in mining increased between 1986 and 1987, but added only 35 jobs, and total wage/salary employment declined by 125 jobs. It should be noted, however, that the yearly averages used to calculate this change actually obscure growth that occurred over the course of 1987. Between the fourth quarter of 1986 and the fourth quarter of 1987, wage/salary jobs posted an increase of 1.9 percent, or about 170 jobs.

Since the early 1970s, the unemployment rate in the Glasgow-Wolf Point Region has remained below and has fluctuated with the statewide average (Figure 2.28). A 1987 unemployment rate of 7.1 percent ranked the region sixth out of 12. Both Daniels and Sheridan counties had relatively low unemployment rates and thus ranked high among counties.

Population

Booming population growth characterized the region from 1900 until 1920, when a plateau was reached that persisted for the next 20 years (Table 2.8). After 1960, population generally declined, with population lowest at 33,000 in 1987. In 1987, the region's population ranked ninth in the state.

Population of the Glasgow-Wolf Point Region, while not varying a great deal in absolute terms between 1969 and 1986, followed the trend in total jobs with a lag of between two and three years (Figures 2.26 and 2.27). For example, total jobs peaked in 1974 and declined to a low in 1977 while population peaked in 1976 and declined to a low in 1980. Between 1969 and 1987, a population decline of 12 percent was the second largest in the state. Performance relative to 1979 is somewhat better: a 5 percent decline ranked ninth among the regions in terms of population change.

Income

Total personal income in 1986 in the Glasgow-Wolf Point Region ranked eighth in the state, slightly better than the ninth-place rankings of population, total jobs, and wage/salary jobs. At least part of the personal income ranking reflects agriculture's strong performance, a key component of personal income in this region.

The influence of farm earnings on total personal income and the volatility of this component are evident in Figure 2.29. Total personal income peaked in 1981, as did farm earnings and nonfarm earnings. (The nonfarm earnings peak was independent of the peak in farm earnings and resulted from increased employment during the construction of a natural gas pipeline across the region in 1981). In the following years, dramatic declines in farm earnings occurred, partially because of drought. In 1983, 1984, and 1985, farm earnings were actually negative in the Glasgow-Wolf Point Region, causing low total personal income for this period. Although nonfarm earnings continued to decline after 1984, a major recovery in the agricultural sector in 1986 caused total personal income to rebound. Personal income in 1987 was about the same as the 1986 level, as was farm earnings. Throughout the 1979-1987 period, property income and transfer payments followed statewide trends (Figures 2.11

and 2.29).

The Glasgow-Wolf Point Region ranked last in per capita income for the 1982-1986 period. This rank is somewhat misleading, however, because it averages four bad years for agriculture with only one good year. As Table 2.25 indicates, the one "good" year for agriculture, 1986, produced notably high per capita income figures throughout the region, particularly in Daniels and Sheridan counties.

The influence of farm earnings on per capita income is further evident between 1979 and 1987. Per capita income for the region peaked in 1981 with farm earnings, and then declined through 1985. The large reverse in farm earnings between 1985 and 1986 resulted in a similar increase in per capita income in that latter year.

Figure 2.26

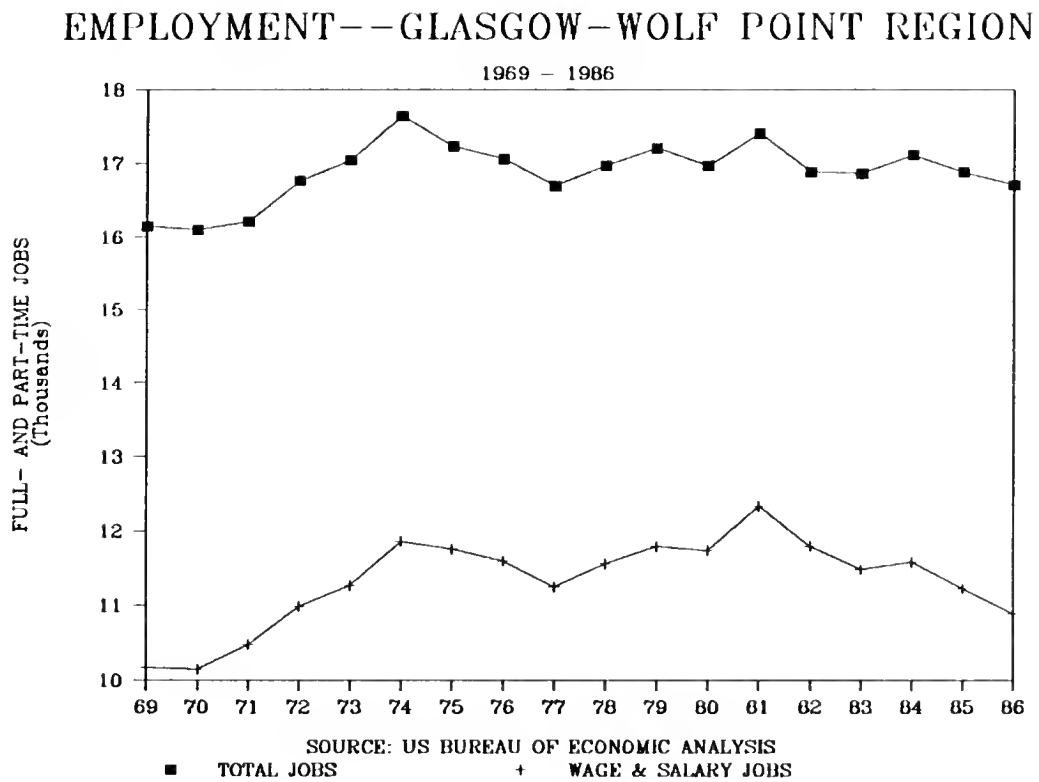


Figure 2.27

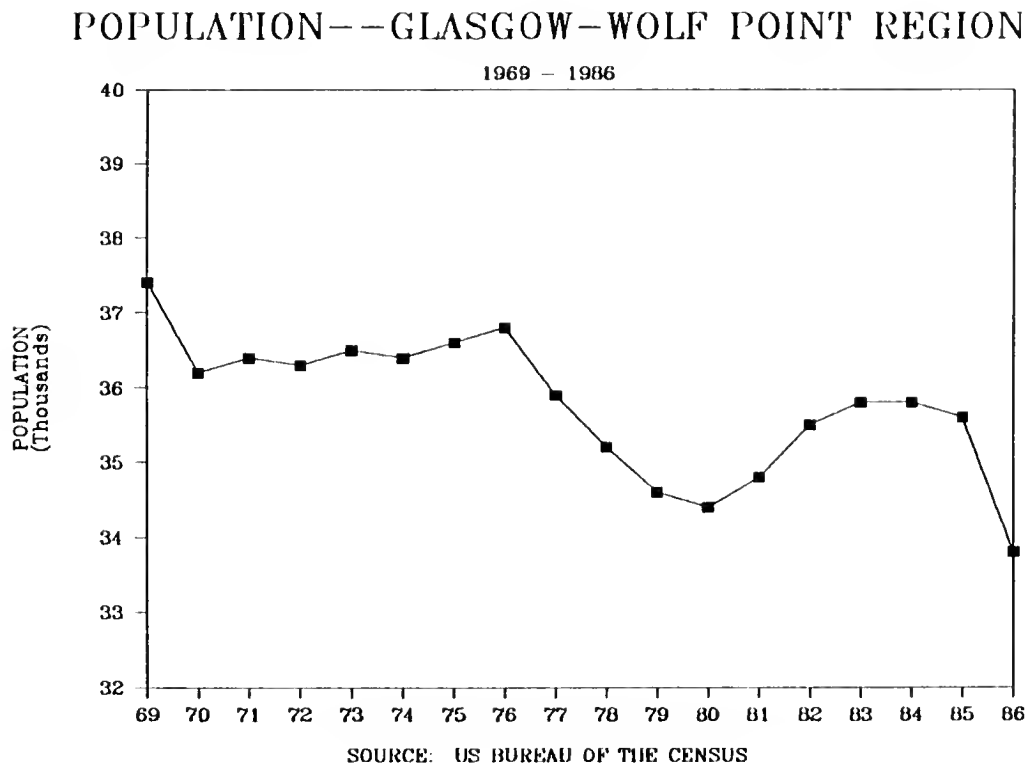


Table 2.24

The Glasgow-Wolf Point Region												Rank in State /d (Region or County)
	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986	1987 /p	
Population /a												
Region	44,600	37,400	34,600	34,400	34,800	35,500	35,800	35,800	35,600	33,800	33,000	9
Daniels	3,700	3,100	2,900	2,800	2,800	2,800	2,800	2,800	2,700	2,600	2,600	43
Phillips	6,000	5,500	5,200	5,400	5,400	5,400	5,600	5,700	5,700	5,500	5,400	34
Roosevelt	11,600	10,500	10,200	10,500	10,800	11,300	11,600	11,800	11,700	11,300	11,200	17
Sheridan	6,400	5,900	5,500	5,500	5,700	6,000	6,000	5,900	5,800	5,500	5,300	35
Valley	16,900	12,400	10,800	10,200	10,100	10,000	9,800	9,800	9,700	8,900	8,600	22
Total Jobs /b												
Region	...	16,150	17,209	16,965	17,407	16,866	16,864	17,113	16,882	16,709	...	9
Daniels	...	1,620	1,517	1,443	1,512	1,563	1,511	1,482	1,449	1,446	...	42
Phillips	...	2,128	2,530	2,579	2,550	2,553	2,637	2,743	2,627	2,767	...	34
Roosevelt	...	4,021	5,025	4,940	5,128	5,304	5,427	5,511	5,539	5,415	...	18
Sheridan	...	2,631	2,879	2,960	3,016	2,780	2,653	2,682	2,612	2,505	...	35
Valley	...	5,150	5,258	5,043	5,201	4,686	4,656	4,695	4,655	4,576	...	21
Wage & Salary Jobs /b												
Region	...	10,160	11,793	11,738	12,331	11,799	11,481	11,582	11,227	10,885	...	9
Daniels	...	761	906	848	912	970	873	848	805	789	...	42
Phillips	...	1,228	1,609	1,688	1,642	1,604	1,661	1,725	1,583	1,691	...	32
Roosevelt	...	3,184	3,648	3,614	3,775	3,939	3,992	4,033	4,021	3,846	...	18
Sheridan	...	1,295	1,833	1,964	2,229	2,006	1,832	1,840	1,760	1,634	...	33
Valley	...	3,692	3,797	3,624	3,773	3,280	3,123	3,136	3,058	2,925	...	23
Unemployment Rate /c												
Region	...	4.3%	3.9%	4.2%	4.6%	6.9%	8.2%	6.4%	7.0%	7.8%	7.1%	6
Daniels	...	3.2%	2.0%	1.8%	2.1%	3.0%	4.4%	4.2%	4.2%	4.7%	4.6%	7
Phillips	...	4.2%	3.7%	4.1%	4.8%	7.7%	8.4%	6.9%	9.7%	7.5%	6.9%	26
Roosevelt	...	5.8%	4.7%	5.3%	5.8%	7.5%	9.0%	7.0%	7.8%	9.5%	8.8%	39
Sheridan	...	3.3%	1.5%	1.6%	1.3%	4.8%	6.6%	4.7%	3.8%	5.7%	4.8%	9
Valley	...	4.0%	5.1%	5.4%	6.4%	8.7%	9.7%	6.8%	7.1%	8.0%	7.1%	28
Total Personal Income (\$1000s) /b												
Region	235,175	340,202	377,458	386,047	439,487	399,350	368,707	365,597	351,291	414,721	407,000	8
Daniels	20,407	34,882	33,967	35,548	40,790	40,508	31,940	29,494	28,232	40,959	...	40
Phillips	34,648	43,384	55,059	56,818	61,858	53,764	50,539	52,485	47,741	61,892	...	36
Roosevelt	50,401	89,532	102,761	109,089	116,457	112,758	112,158	111,034	110,207	119,189	...	20
Sheridan	36,694	59,109	63,867	66,799	85,845	78,136	70,442	69,154	66,706	78,308	...	30
Valley	93,025	113,295	121,804	119,794	136,537	114,183	103,629	103,430	98,405	114,393	...	21
Per Capite Personal Income /b												
Region	5,273	9,097	10,903	11,211	12,642	11,259	10,294	10,245	9,863	12,284	12,300	12
Daniels	5,516	11,096	11,898	12,561	14,552	14,498	11,314	10,628	10,270	15,782	...	10
Phillips	5,775	7,957	10,532	10,573	11,470	9,920	8,964	9,206	8,402	11,278	...	32
Roosevelt	4,345	8,511	10,041	10,348	10,788	9,999	9,693	9,602	9,423	10,511	...	45
Sheridan	5,733	10,105	11,635	11,840	14,718	13,016	11,784	11,741	11,467	14,347	...	11
Valley	5,504	9,114	11,262	11,728	13,578	11,447	10,564	10,602	10,171	12,881	...	28
Nonfarm Earnings (\$1000s) /b												
Region	145,065	173,619	232,501	226,944	255,412	220,488	213,713	218,885	210,788	205,861	203,000	9
Daniels	9,812	10,420	14,690	13,638	14,263	15,222	14,015	13,782	15,128	12,955	...	42
Phillips	14,499	17,919	29,357	30,888	28,800	27,542	28,895	33,106	28,588	31,251	...	31
Roosevelt	31,677	51,577	72,088	68,786	69,551	72,768	73,843	74,565	74,500	71,548	...	19
Sheridan	18,073	23,985	38,703	41,785	48,871	40,410	35,601	34,816	33,726	31,729	...	29
Valley	71,004	69,718	77,665	71,848	93,926	64,746	81,359	62,615	60,846	58,378	...	21
Farm Earnings (\$1000s) /b												
Region	38,821	91,385	20,425	27,180	55,436	25,467	(8,964)	(17,138)	(24,341)	43,628	38,000	5
Daniels	5,213	15,109	5,130	6,938	10,139	8,807	812	(1,307)	(1,695)	11,231	...	12
Phillips	11,610	12,606	4,494	4,467	9,441	1,114	(4,270)	(5,683)	(6,026)	5,604	...	31
Roosevelt	5,302	18,266	816	6,814	9,689	2,296	(4,074)	(5,312)	(6,810)	4,679	...	37
Sheridan	8,672	21,070	3,646	1,206	11,805	10,169	2,401	368	(1,168)	12,218	...	11
Valley	8,025	23,734	6,339	7,755	14,563	3,081	(3,833)	(5,204)	(8,042)	9,898	...	16
Property Income (\$1000s) /b												
Region	30,386	46,611	82,710	87,045	96,290	102,285	107,354	108,936	107,194	106,575	106,000	8
Daniels	3,578	5,821	9,725	10,243	11,227	11,209	11,475	11,950	11,707	11,596	...	39
Phillips	5,172	7,523	13,973	14,650	15,980	16,401	16,918	16,763	16,009	15,901	...	34
Roosevelt	7,118	11,728	18,194	19,341	21,789	22,894	26,160	25,643	25,937	25,823	...	18
Sheridan	6,230	9,423	16,938	18,051	20,350	22,081	24,821	26,038	25,899	25,767	...	19
Valley	8,287	12,116	23,880	24,760	26,943	29,699	27,980	28,542	27,642	27,488	...	15
Transfer Payments (\$1000s) /b												
Region	25,561	38,225	59,160	62,413	65,912	69,207	72,668	72,432	74,256	76,428	77,000	8
Daniels	2,164	4,255	5,645	5,866	6,332	6,562	6,828	6,330	6,382	6,482	...	43
Phillips	5,840	5,937	8,830	9,114	9,814	10,900	11,027	11,640	11,971	12,302	...	35
Roosevelt	6,893	11,198	17,062	18,080	19,129	20,283	21,412	21,667	22,235	22,976	...	19
Sheridan	4,192	5,220	8,813	9,450	9,803	10,700	11,518	11,497	11,713	12,035	...	36
Valley	8,472	11,615	18,811	19,904	20,834	20,763	21,882	21,298	21,954	22,633	...	20

/a U.S. Bureau of the Census

/b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capite Income (1982-1986 average)

/p 1987 data consists of preliminary estimates.

Table 2.25

INDUSTRY	SIC** CODE	1986	1987	CHANGE	PERCENT CHANGE
Total Wage and Salary Employment		8,957	8,832	(125)	-1.4%
Total Private		6,387	6,262	(125)	-2.0%
Agriculture, Forestry, Fishing, Hunting, & Trapping		67	72	5	7.5%
Agricultural Production--Crops ***	01	9	14	5	55.6%
Agricultural Production--Livestock ***	02	28	26	(2)	-7.1%
Agricultural Services	07	27	28	1	3.7%
Forestry	08				
Fishing, Hunting, and Trapping	09				
Mining		253	288	35	13.8%
Metal Mining	10	"0"	"0"	"0"	"0"
Coal Mining	12	"0"	"0"	"0"	"0"
Oil and Gas Extraction	13	131	154	23	17.6%
Mining of Non-Metallic Minerals, Except Fuels	14	7	"0"	"0"	"0"
Construction		221	198	(23)	-10.4%
General Building Contractors	15	64	51	(13)	-20.3%
Heavy Construction Contractors	16	49	66	17	34.7%
Special Trade Contractors	17	105	74	(31)	-29.5%
Manufacturing		682	628	(54)	-7.9%
Food and Kindred Products	20	41	23	(18)	-43.9%
Textile Mill Products	22				
Apparel and Other Textile Products	23	"0"	"0"	"0"	"0"
Lumber and Wood Products	24	"0"	"0"	"0"	"0"
Furniture and Fixtures	25				
Paper and Allied Products	26				
Printing and Publishing	27	50	47	(3)	-6.0%
Chemicals and Allied Products	28	"0"	"0"	"0"	"0"
Petroleum Refining and Related Industries	29	"0"	"0"	"0"	"0"
Rubber and Miscellaneous Plastic Products	30				
Leather and Leather Products	31				
Stone, Clay, Glass, and Concrete Products	32	38	53	15	39.5%
Primary Metals Processing	33				
Fabricated Metal Products	34	"0"	"0"	"0"	"0"
Machinery, Except Electrical	35	"0"	"0"	"0"	"0"
Electrical and Electronic Equipment	36	"0"	"0"	"0"	"0"
Transportation Equipment	37				
Instruments and Related Products	38				
Miscellaneous Manufacturing Industries	39				
Transportation and Public Utilities		E 421	E 407	E (14)	E -3.3%
Local and Interurban Passenger Transit	41	7	7	0	0.0%
Trucking and Warehousing	42	128	115	(13)	-10.2%
Water Transportation	44	"0"	"0"	"0"	"0"
Transportation by Air	45	9	7	(2)	-22.2%
Pipelines, Except Natural Gas	46				
Transportation Services	47	5	6	1	20.0%
Communications	48	122	120	(2)	-1.6%
Electric, Gas, and Sanitary Services	49	150	152	2	1.3%
Wholesale Trade		477	460	(17)	-3.6%
Durable Goods	50	206	192	(14)	-6.8%
Nondurable Goods	51	268	265	(3)	-1.1%
Retail Trade		1,778	1,724	(54)	-3.0%
Building Materials and Hardware	52	151	157	6	4.0%
General Merchandise Stores	53	93	95	2	2.2%
Food Stores	54	363	345	(18)	-5.0%
Automotive Dealers and Service Stations	55	266	257	(9)	-3.4%
Apparel and Accessory Stores	56	90	84	(6)	-6.7%
Furniture and Home Furnishings Stores	57	32	40	8	25.0%
Eating and Drinking Places	58	653	598	(55)	-8.4%
Miscellaneous Retail	59	115	131	16	13.9%
Finance, Insurance, and Real Estate		443	437	(6)	-1.4%
Banking	60	254	243	(11)	-4.3%
Credit Agencies other than Banks	61	52	54	2	3.8%
Security, Commodity Brokers, and Services	62				
Insurance Carriers	63	"0"	"0"	"0"	"0"
Insurance Agents, Brokers, and Services	64	46	40	(6)	-13.0%
Real Estate	65	74	81	7	9.5%
Combined Real Estate, Insurance, Etc.	66	"0"	"0"	"0"	"0"
Holding and Other Investment Offices	67	"0"	"0"	"0"	"0"
Services		2,014	2,019	5	0.2%
Hotels and Other Lodging Places	70	221	215	(6)	-2.7%
Personal Services	72	41	43	2	4.9%
Business Services	73	72	62	(10)	-13.9%
Auto Repair, Services, and Garages	75	36	34	(2)	-5.6%
Miscellaneous Repair Services	76	10	8	(2)	-20.0%
Motion Pictures	78	31	25	(6)	-19.4%
Amusement and Recreation Services	79	23	21	(2)	-8.7%
Private Health Services	80	932	953	21	2.3%
Legal Services	81	32	36	4	12.5%
Private Educational Services	82	"0"	77	"0"	"0"
Private Social Services	83	90	93	3	3.3%
Museums, Art Galleries, Etc.	84				
Membership Organizations including Tribal Gov't	86	413	383	(30)	-7.3%
Private Households	88	"0"	5	"0"	"0"
Engineering, Accounting, and Other Services	89	46	43	(3)	-6.5%
Non-Classifiable	99	"0"	"0"	"0"	"0"
Government		2,568	2,568	0	0.0%
State		214	200	(14)	-6.5%
Local		1,846	1,846	0	0.0%
Federal		503	517	14	2.8%

*Includes only employment covered by the Unemployment Insurance Program.

**Standard Industrial Classification

***These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.28

UNEMPLOYMENT RATE -- GLASGOW -- WOLF PT REG

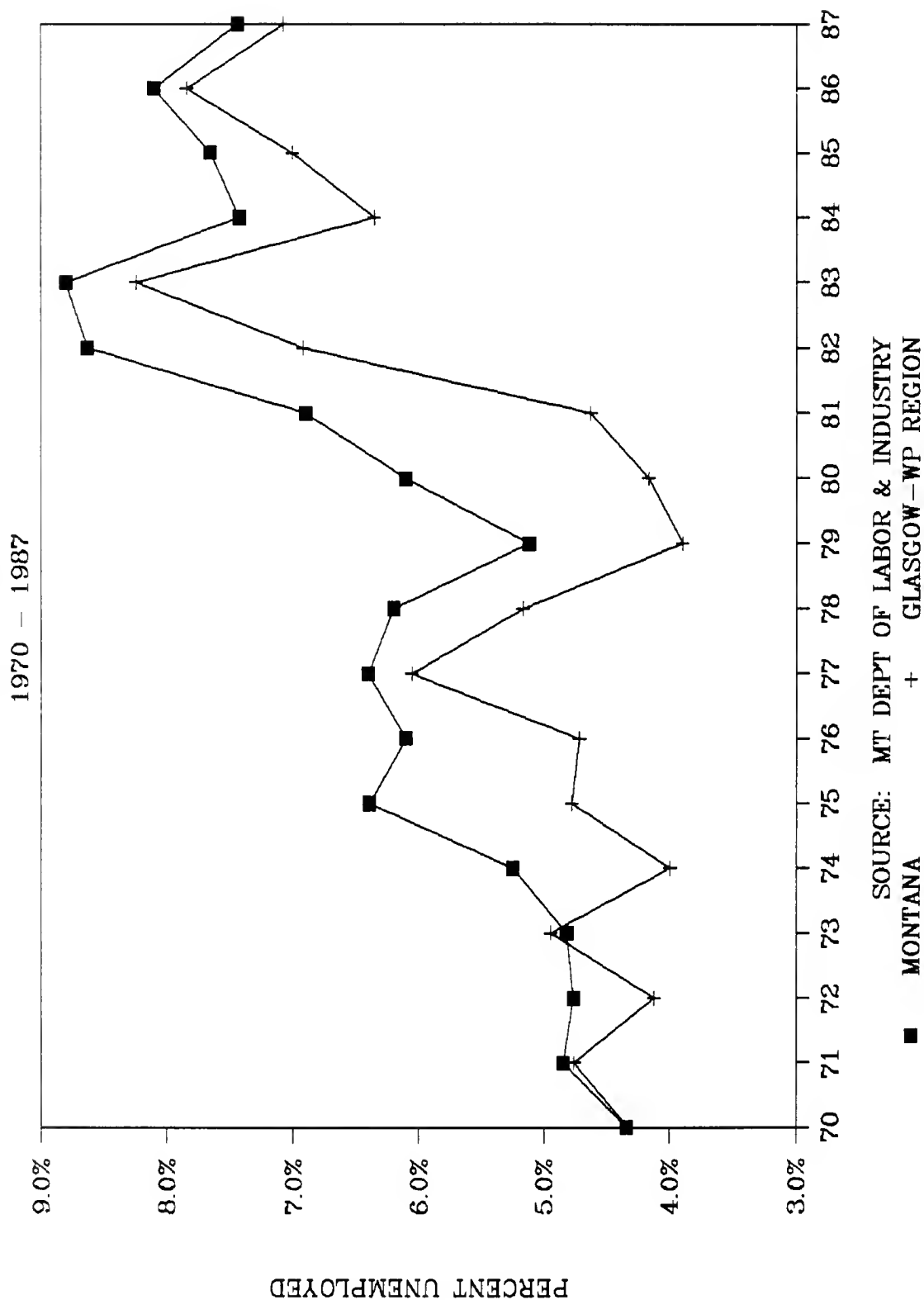
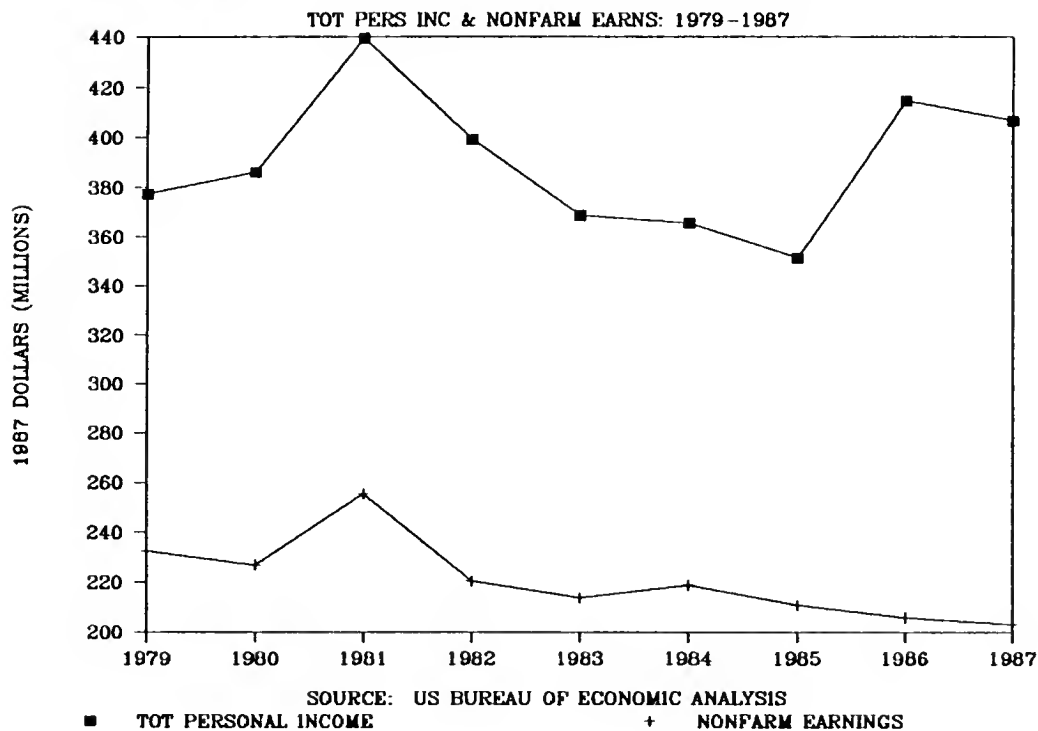
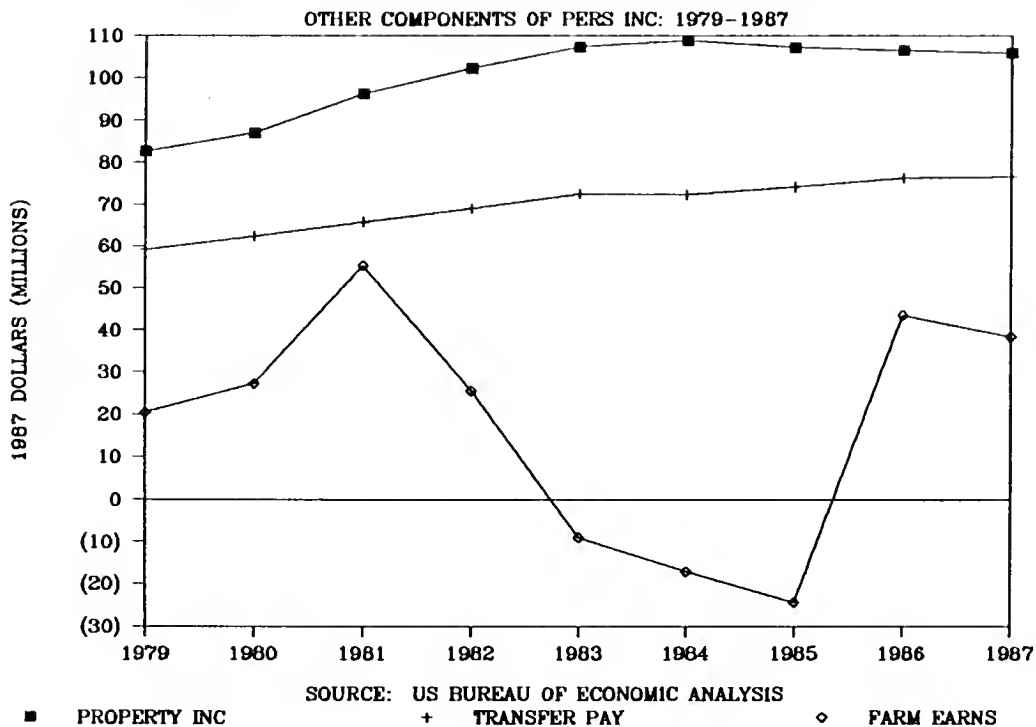


Figure 2.29

INCOME -- GLASGOW-WOLF POINT REGION



INCOME -- GLASGOW-WOLF POINT REGION



The Glendive-Sidney Region

Located in eastern Montana, the Glendive-Sidney Region includes Dawson, Garfield, McCone, Prairie, Richland, and Wibaux counties.

Labor Force

With just over 15,500 total jobs, the Glendive-Sidney Region ranked 10th in 1986 among Montana's regions (Table 2.26). Most jobs were concentrated in Richland and Dawson counties, which ranked 14th and 16th out of 56 counties in total number of jobs, respectively. In 1986, the region accounted for 3.8 percent of Montana's jobs, down from 4.7 percent in 1969 (Figure 2.3).

Steady job growth in the 1970s (slow at first and then gradually accelerating until 1981) resulted in a peak in both total and wage/salary jobs in 1981 (Figure 2.30). Oil/gas exploration activity produced most of the growth. Since 1981, however, a sharp decline in jobs has characterized the region, with total jobs falling 19 percent by 1986. In 1987, wage/salary jobs declined, continuing this trend. A decrease in oil/gas exploration was the primary cause of the downward trend.

Moderate growth in self-employment, which accounts for about one-third of total jobs in the region, has helped to mollify this decline. Between 1979 and 1986, when wage/salary jobs declined by 16 percent, the number of self-employed grew by 17 percent. Although this rate was well below the statewide average of 30 percent, it was sufficient to hold the loss of total jobs to 7 percent (Table 2.5).

The most important employing sectors in the Glendive-Sidney Region include agriculture, retail trade, services, government, and oil/gas mining, which fluctuates greatly from year to year. As has been the case statewide, the regional dominance of agriculture in the region has been declining over the last 20 years. In 1969, agriculture accounted for 29 percent of all jobs, but by 1986 it had fallen to 18 percent. The shares of retail trade, services, wholesale trade, and finance/insurance/real estate all have increased over this period, reflecting the gradual shift throughout the state and the nation toward service-oriented industries.

The 1970s witnessed steady employment growth for all sectors of the economy except for agriculture and food products manufacturing. Sectoral job growth continued until 1981, except for government and agriculture/food products. Between 1981 and 1986, as total jobs declined markedly (Figure 2.30), wage/salary employment declined in every sector except government. A loss of about 2,000 jobs in the oil/gas extraction industry as exploration activity declined (world oil prices peaked in 1981) dominated the downturn, producing large declines in other segments of the economy. Declines in wage/salary jobs continued between 1986 and 1987 (Table 2.27), when losses in every major sector resulted in a regional decline of more than 600 jobs (7 percent). It should be noted, however, that this figure overstates the magnitude of the decline because the gradual improvement over the course of 1987 is hidden in the annual average data. In comparing the fourth quarter of 1986 with the

fourth quarter of 1987, the decline involved only about 300 jobs, or 3.6 percent of the wage/salary jobs.

The unemployment rate in the Glendive-Sidney Region remained well below the state average in the 1970s (Figure 2.32). The exception to this experience is obvious from the graph: between 1981 and 1983, the unemployment rate increased threefold--to 9.4 percent--mainly in Dawson, Richland, and Wibaux counties. Much of this increase likely was created by declining oil/gas employment and the delay in the out-migration of unemployed workers. After 1983, however, the unemployment rate returned to a point below the state average, and by 1987 the region's unemployment rate of 6.8 percent was third lowest in the state, and under the statewide rate of 7.4 percent. (Low unemployment rates are typical for counties dominated by agriculture.) Table 2.26 shows unemployment rates of 2.8 percent for McCone County and 3.4 percent for Garfield County, ranking them first and second respectively among the state's counties.

Population

With a population just under 30,000, the Glendive-Sidney Region ranked 10th among the regions in 1987. As with jobs, most of the population was located in Richland and Dawson counties.

Regional population peaked in 1930 after strong, early growth. Since that time, however, population growth has been erratic (Table 2.8). Population growth was strong between 1969 and 1982 (Figure 2.31), but between 1982 and 1987, steady declines in population occurred, following the trend in total jobs. Indeed, a close relationship between total (or wage/salary) jobs and population seems to hold between 1969 and 1986, with a lag of about one year. For example, the lowest population in the region for this time period (1972) occurred one year after total jobs was at its lowest point (1971). And population peaked in 1982 just one year after the 1981 peak in total jobs.

Income

Total personal income in the Glendive-Sidney Region ranked 10th in the state in 1986, consistent with the ranks of population and total jobs (Table 2.26). As with population and jobs, most of this income was located in Richland and Dawson counties.

Total personal income was influenced by two major factors during the 1979-1987 period: both nonfarm earnings and farm earnings peaked in 1981, with the peak in nonfarm worker earnings related to oil/gas exploration. As a result, total personal income peaked in 1981 (Figure 2.33). Decline in nonfarm earnings after 1981, coupled with the severe decrease in farm earnings during the 1981-1985 period, resulted in a steady decline in total personal income between 1981 and 1985. Farm earnings recovered in 1986 and ranked third in the state. Recovery in the agricultural sector more than offset the continued decline in nonfarm earnings, and total personal income increased in 1986. During 1987, however, estimated farm earnings remained relatively constant, and the decline in nonfarm earnings translated into another decline in

personal income. Throughout this entire period, property income and transfer payments followed the statewide trend by increasing slightly.

The Glendive-Sidney Region ranked sixth in per capita income for the 1982-1986 period among Montana's regions (Table 2.26). Dawson County, which ranked 12th, had the highest county rank in the region. Because this average includes four bad years for agriculture and only one good year, however, it is potentially misleading.

Figure 2.30

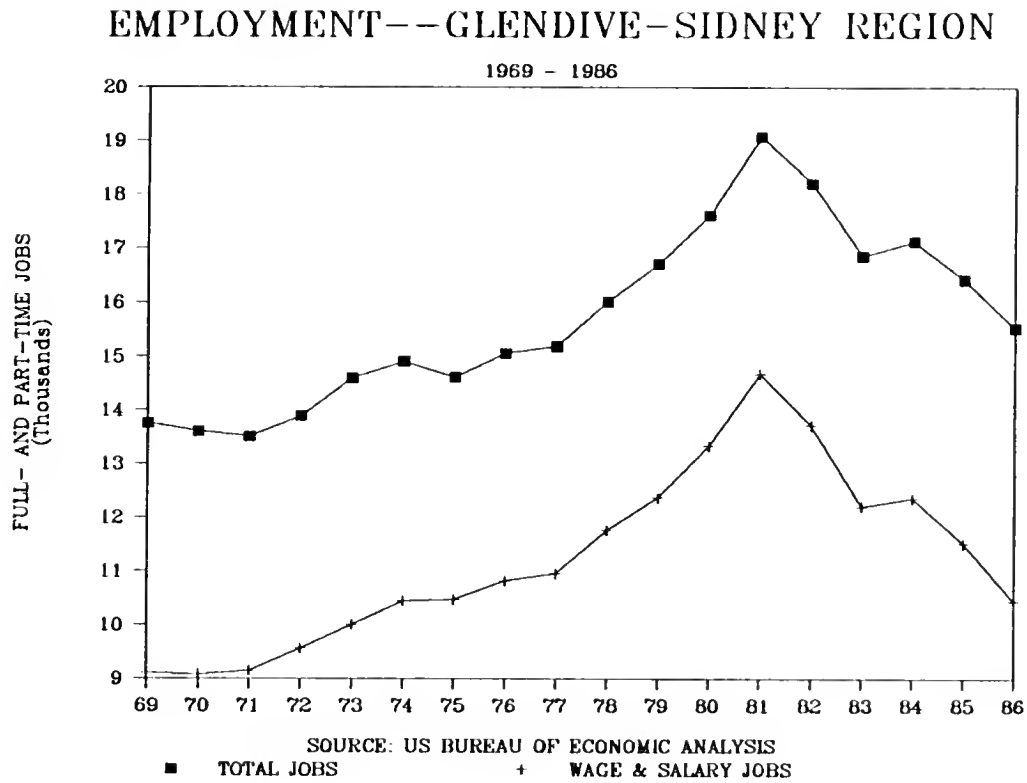


Figure 2.31

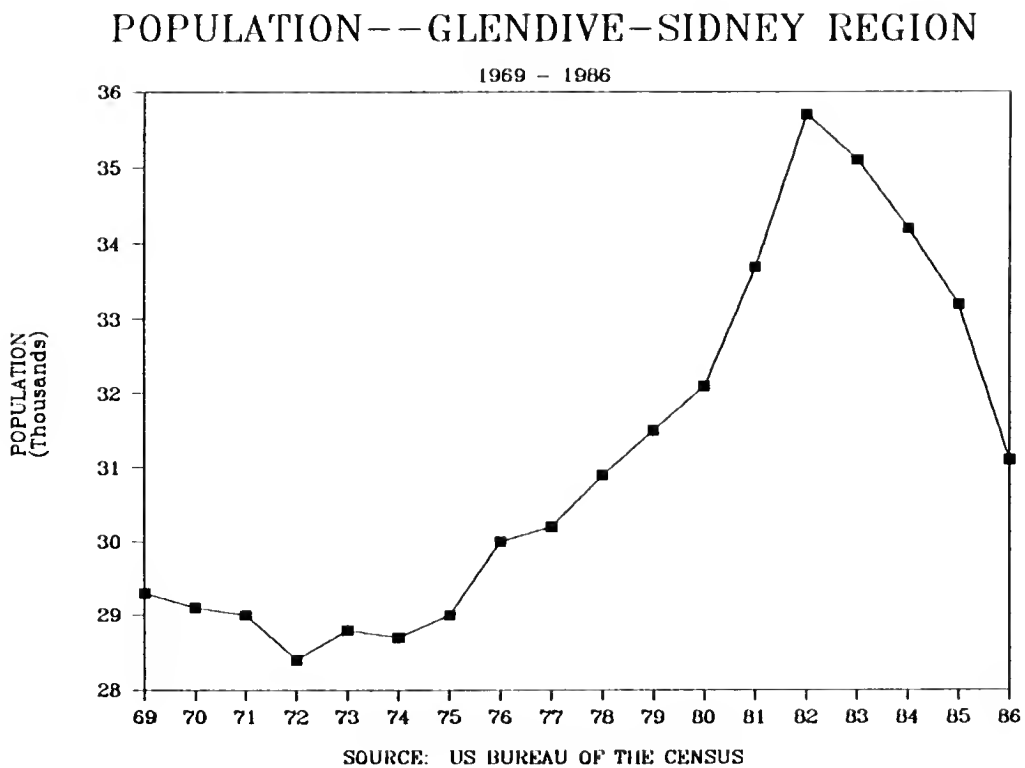


Table 2.26

The Glandive-Stoney Region

	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986	1987 /p	Rank in State /d (Region or County)
<hr/>												
Population /a												
Region	31,900	29,300	31,500	32,100	33,700	33,700	33,100	34,200	33,200	31,100	29,600	10
Dawson	12,200	11,400	11,900	11,900	12,200	12,800	12,800	12,200	11,800	10,900	10,500	20
Garfield	2,000	1,800	1,700	1,700	1,700	1,700	1,700	1,700	1,700	1,600	1,600	32
McCone	3,300	2,900	2,700	2,700	2,700	2,800	2,700	2,600	2,600	2,600	2,500	44
Prairie	2,300	1,800	1,900	1,800	1,900	1,900	1,900	1,900	1,800	1,700	1,600	51
Richland	10,600	9,900	11,700	12,500	13,600	14,900	14,700	14,300	13,900	13,000	12,100	13
Wibaux	1,700	1,500	1,600	1,500	1,600	1,600	1,500	1,500	1,600	1,500	1,500	33
Total Jobs /b												
Region	...	13,765	16,707	17,608	19,071	18,206	16,851	17,121	16,423	15,527	...	10
Dawson	...	5,405	6,365	6,605	7,020	6,956	6,423	6,304	6,010	5,720	...	16
Garfield	...	961	878	869	868	896	911	907	901	905	...	31
McCone	...	1,488	1,462	1,379	1,370	1,397	1,346	1,326	1,248	1,316	...	44
Prairie	...	868	907	937	813	811	803	805	814	816	...	52
Richland	...	4,382	6,376	7,140	6,313	7,470	6,703	7,121	6,760	6,115	...	14
Wibaux	...	681	699	678	687	678	665	638	650	655	...	33
Wage & Salary Jobs /b												
Region	...	9,102	12,376	13,338	14,688	13,727	12,212	12,364	11,523	10,444	...	10
Dawson	...	4,147	5,126	5,350	5,709	5,388	4,995	4,813	4,462	4,102	...	17
Garfield	...	500	511	513	505	529	534	527	516	514	...	50
McCone	...	739	890	835	820	860	794	764	721	739	...	43
Prairie	...	472	587	619	497	481	471	469	469	459	...	31
Richland	...	2,915	4,862	5,654	6,783	5,922	5,086	5,467	5,044	4,323	...	15
Wibaux	...	329	360	367	374	347	332	322	311	307	...	33
Unemployment Rate /c												
Region	...	2.9%	2.7%	2.6%	2.8%	6.7%	9.4%	5.6%	5.7%	7.3%	6.8%	3
Dawson	...	2.9%	3.4%	3.0%	3.2%	6.9%	10.0%	5.3%	4.9%	5.5%	6.1%	19
Garfield	...	1.4%	4.7%	3.1%	1.9%	2.6%	3.3%	2.7%	2.7%	3.6%	3.4%	2
McCone	...	1.9%	1.7%	1.7%	1.9%	3.5%	4.1%	3.1%	3.1%	3.6%	2.8%	1
Prairie	...	3.0%	2.7%	2.7%	4.6%	5.1%	4.2%	6.5%	5.4%	6.6%	3.6%	16
Richland	...	3.6%	1.9%	2.3%	2.3%	7.6%	10.4%	5.6%	6.7%	10.4%	9.1%	43
Wibaux	...	3.2%	3.0%	2.6%	4.0%	8.0%	13.2%	9.3%	8.0%	6.9%	5.4%	13
Total Personal Income (\$1000s) /b												
Region	170,238	277,155	380,608	417,727	474,127	437,733	393,421	388,335	365,250	383,087	362,000	10
Dawson	69,129	105,825	155,279	161,885	175,968	170,063	153,808	148,486	138,942	137,710	...	16
Garfield	10,167	24,675	21,501	20,232	25,090	20,148	17,715	15,862	14,485	23,399	...	50
McCone	13,474	27,966	28,024	33,445	36,367	32,990	27,058	27,100	24,373	33,092	...	44
Prairie	12,671	14,446	19,655	21,533	21,014	17,882	16,994	17,865	16,527	19,778	...	32
Richland	53,457	89,916	161,514	163,719	196,914	180,299	163,231	163,911	157,893	154,296	...	14
Wibaux	11,360	14,148	15,634	16,912	18,795	16,351	14,618	15,330	13,030	14,812	...	33
Per Capita Personal Income /b												
Region	5,337	9,451	12,071	13,003	14,078	12,288	11,175	11,389	11,013	12,336	12,200	6
Dawson	5,666	9,304	12,897	13,607	14,374	13,330	12,181	12,219	11,808	12,647	...	12
Garfield	5,083	13,594	12,263	12,196	15,078	12,050	10,479	9,127	8,371	14,408	...	32
McCone	4,083	9,575	10,708	12,364	13,414	11,884	9,450	10,245	9,472	12,922	...	34
Prairie	5,509	8,117	10,584	11,491	11,298	9,417	8,907	9,646	9,171	11,957	...	46
Richland	5,140	9,062	12,068	13,068	14,433	12,067	11,112	11,501	11,338	11,848	...	22
Wibaux	4,670	9,496	9,933	11,319	12,049	10,362	9,460	10,310	9,264	11,367	...	60
Nonfarm Earnings (\$1000s) /b												
Region	110,032	152,773	255,861	275,791	310,664	282,506	241,024	247,386	230,754	204,465	187,000	10
Dawson	54,330	73,006	112,582	115,868	126,469	119,617	105,685	101,594	94,476	83,670	...	16
Garfield	3,481	3,104	3,717	5,433	5,174	5,405	3,586	3,472	3,565	5,569	...	51
McCone	9,394	10,120	13,428	12,651	11,542	12,562	11,797	11,446	11,121	11,035	...	46
Prairie	5,254	4,882	7,566	9,920	3,952	5,918	5,912	5,874	5,755	5,844	...	50
Richland	31,399	54,270	108,346	125,551	155,542	133,236	106,640	117,586	108,508	91,219	...	15
Wibaux	6,175	5,392	6,262	6,568	6,024	5,787	5,364	5,413	5,328	5,127	...	33
Farm Earnings (\$1000s) /b												
Region	27,814	72,569	26,152	31,956	50,813	26,322	10,147	8,734	4,492	45,861	42,000	3
Dawson	3,581	14,436	5,345	6,272	9,411	4,352	1,495	1,174	661	7,340	...	25
Garfield	4,617	16,112	9,010	7,860	12,462	4,666	3,968	2,128	420	9,281	...	18
McCone	1,532	13,090	4,947	10,400	13,406	8,925	3,373	4,044	1,897	10,832	...	14
Prairie	4,669	5,316	4,409	2,450	4,625	1,324	398	1,309	419	3,678	...	43
Richland	11,099	18,468	861	3,113	6,537	4,303	999	(L)	1,954	12,742	...	9
Wibaux	2,516	5,127	1,641	1,461	2,372	352	(487)	(L)	(859)	1,787	...	32
Property Income (\$1000s) /b												
Region	22,013	34,324	65,664	68,755	77,139	83,777	84,961	86,270	84,366	84,153	83,000	9
Dawson	7,951	12,466	22,818	23,843	26,765	30,247	27,955	28,259	27,490	27,273	...	16
Garfield	1,365	2,256	4,169	4,239	4,692	5,284	5,158	3,176	5,254	5,220	...	31
McCone	2,172	3,340	7,948	7,490	7,764	7,828	7,490	7,881	7,367	7,499	...	43
Prairie	1,491	2,238	4,227	4,786	3,439	5,667	3,825	5,447	5,697	3,632	...	50
Richland	7,140	12,035	23,399	23,015	28,611	30,896	33,977	34,535	34,338	34,507	...	14
Wibaux	1,894	2,189	3,104	3,582	3,869	3,875	4,338	4,373	4,040	4,024	...	33
Transfer Payments (\$1000s) /b												
Region	15,727	25,512	44,958	47,960	49,052	54,468	59,983	59,107	59,538	61,514	62,000	10
Dawson	3,376	9,924	17,795	18,456	18,644	20,714	22,822	22,771	21,704	22,343	...	21
Garfield	916	1,319	2,439	2,637	2,643	2,713	2,975	2,986	3,374	3,507	...	31
McCone	1,324	1,921	3,204	3,223	3,804	4,211	4,647	4,394	4,482	4,617	...	48
Prairie	1,188	2,180	3,209	3,399	3,989	3,899	4,017	4,148	4,153	4,297	...	46
Richland	5,934	8,353	15,838	16,860	17,320	20,002	22,162	21,532	22,820	23,439	...	18
Wibaux	988	1,415	2,473	2,963	2,453	2,927	3,260	3,273	3,205	3,311	...	32

/a U.S. Bureau of the Census

/b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average)

/p 1987 data consists of preliminary estimates.

INDUSTRY	SIC** CODE	1986	1987	CHANGE	PERCENT CHANGE
Total Wage and Salary Employment		8,385	7,783	(602)	-7.2%
Total Private		6,266	5,739	(527)	-8.4%
Agriculture, Forestry, Fishing, Hunting, & Trapping		45	"0"	"0"	"0"
Agricultural Production--Crops ***	01	7	"0"	"0"	"0"
Agricultural Production--Livestock ***	02	29	17	(12)	-41.4%
Agricultural Services	07	8	8	0	0.0%
Forestry	08				
Fishing, Hunting, and Trapping	09				
Mining		704	578	(126)	-17.9%
Metal Mining	10				
Coal Mining	12	"0"	"0"	"0"	"0"
Oil and Gas Extraction	13	679	556	(123)	-18.1%
Mining of Non-Metallic Minerals, Except Fuels	14	"0"	"0"	"0"	"0"
Construction		353	246	(107)	-30.3%
General Building Contractors	15	44	35	(9)	-20.5%
Heavy Construction Contractors	16	208	126	(82)	-39.4%
Special Trade Contractors	17	98	80	(18)	-18.4%
Manufacturing		457	436	(21)	-4.6%
Food and Kindred Products	20	324	309	(15)	-4.6%
Textile Mill Products	22				
Apparel and Other Textile Products	23				
Lumber and Wood Products	24	"0"	"0"	"0"	"0"
Furniture and Fixtures	25	"0"	"0"	"0"	"0"
Paper and Allied Products	26				
Printing and Publishing	27	58	51	(7)	-12.1%
Chemicals and Allied Products	28	"0"	"0"	"0"	"0"
Petroleum Refining and Related Industries	29				
Rubber and Miscellaneous Plastic Products	30		"0"	"0"	"0"
Leather and Leather Products	31	"0"	"0"	"0"	"0"
Stone, Clay, Glass, and Concrete Products	32	"0"	"0"	"0"	"0"
Primary Metals Processing	33				
Fabricated Metal Products	34				
Machinery, Except Electrical	35	"0"	"0"	"0"	"0"
Electrical and Electronic Equipment	36				
Transportation Equipment	37				
Instruments and Related Products	38				
Miscellaneous Manufacturing Industries	39				
Transportation and Public Utilities		E 749	E 662	E (87)	E -11.6%
Local and Interurban Passenger Transit	41	19	24	5	26.3%
Trucking and Warehousing	42	250	205	(45)	-18.0%
Water Transportation	44				
Transportation by Air	45	"0"	"0"	"0"	"0"
Pipelines, Except Natural Gas	46				
Transportation Services	47	8	6	(2)	-25.0%
Communications	48	185	144	(41)	-22.2%
Electric, Gas, and Sanitary Services	49	287	283	(4)	-1.4%
Wholesale Trade		440	424	(16)	-3.6%
Durable Goods	50	244	223	(21)	-8.6%
Non-durable Goods	51	193	197	4	2.1%
Retail Trade		1,686	1,586	(100)	-5.9%
Building Materials and Hardware	52	74	77	3	4.1%
General Merchandise Stores	53	180	141	(39)	-21.7%
Food Stores	54	299	288	(11)	-3.7%
Automotive Dealers and Service Stations	55	288	266	(22)	-7.6%
Apparel and Accessory Stores	56	63	57	(6)	-9.5%
Furniture and Home Furnishings Stores	57	71	51	(20)	-28.2%
Eating and Drinking Places	58	531	524	(7)	-1.3%
Miscellaneous Retail	59	166	173	7	4.2%
Finance, Insurance, and Real Estate		391	383	(8)	-2.0%
Banking	60	236	221	(15)	-6.4%
Credit Agencies other than Banks	61	46	42	(4)	-8.7%
Security, Commodity Brokers, and Services	62	"0"	5	"0"	"0"
Insurance Carriers	63	"0"	"0"	"0"	"0"
Insurance Agents, Brokers, and Services	64	43	42	(1)	-2.3%
Real Estate	65	51	59	8	15.7%
Combined Real Estate, Insurance, Etc.	66				
Holding and Other Investment Offices	67	"0"	"0"	"0"	"0"
Services		1,415	1,364	(51)	-3.6%
Hotels and Other Lodging Places	70	191	128	(63)	-33.0%
Personal Services	72	95	88	(7)	-7.4%
Business Services	73	78	51	(27)	-34.6%
Auto Repair, Services, and Garages	75	41	36	(5)	-12.2%
Miscellaneous Repair Services	76	39	31	(8)	-20.5%
Motion Pictures	78	17	15	(2)	-11.8%
Amusement and Recreation Services	79	49	57	8	16.3%
Private Health Services	80	652	699	47	7.2%
Legal Services	81	42	37	(5)	-11.9%
Private Educational Services	82	"0"	"0"	"0"	"0"
Private Social Services	83	33	34	1	3.0%
Museums, Art Galleries, Etc.	84	"0"	"0"	"0"	"0"
Membership Organizations including Tribal Gov't	86	78	83	5	6.4%
Private Households	88	"0"	6	"0"	"0"
Engineering, Accounting, and Other Services	89	64	67	3	4.7%
Non-Classifiable	99	"0"	"0"	"0"	"0"
Government		2,116	2,041	(75)	-3.5%
State		320	303	(17)	-5.3%
Local		1,625	1,551	(74)	-4.6%
Federal		166	183	17	10.2%

*Includes only employment covered by the Unemployment Insurance Program.

**Standard Industrial Classification

***These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.32

UNEMPLOYMENT RATE -- GLENDIVE -- SIDNEY REG

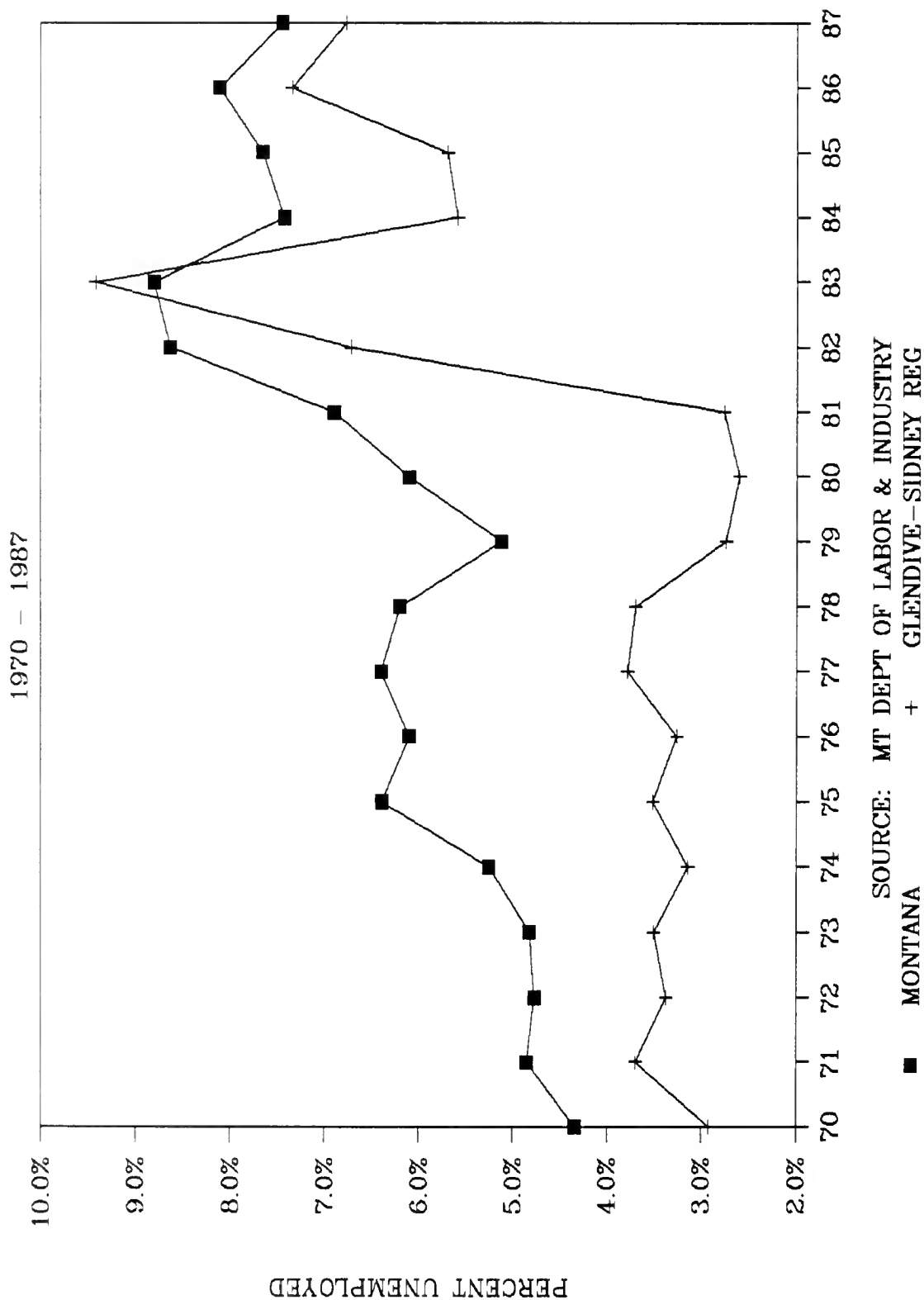
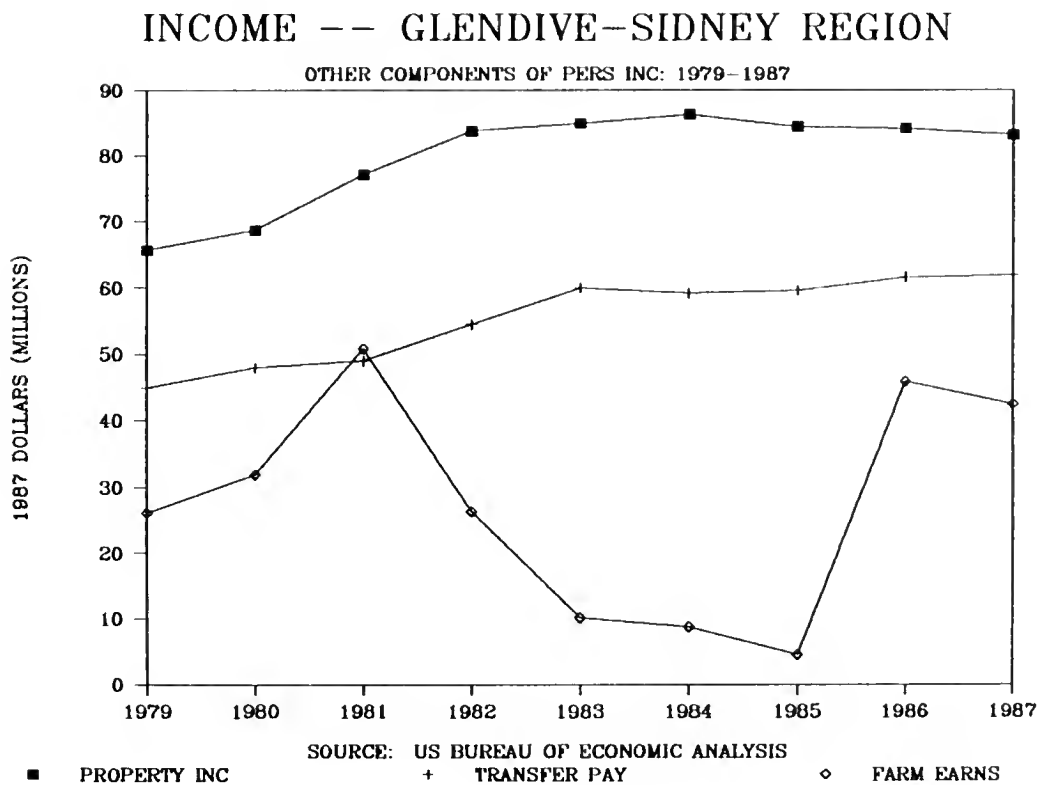
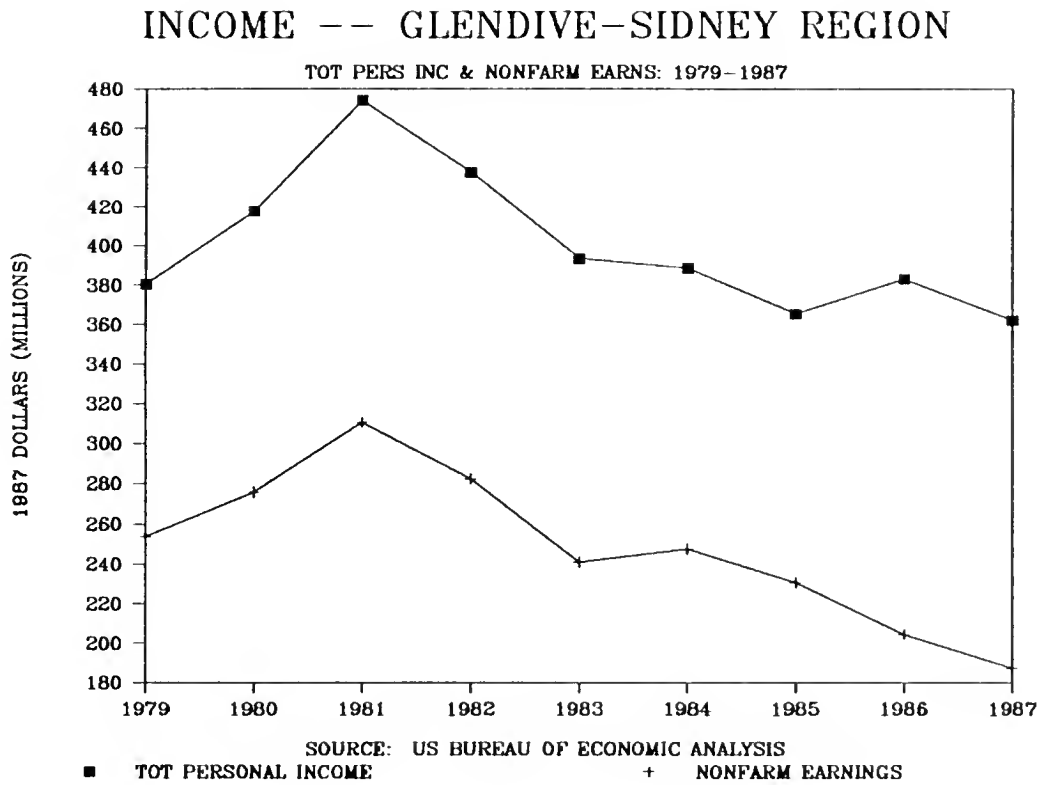


Figure 2.33



The Great Falls Region

The Great Falls Region of north central Montana includes Cascade, Chouteau, Glacier, Pondera, Teton, and Toole counties.

Labor Force

In 1986, the Great Falls Region ranked second in the state in both total and wage/salary jobs (Table 2.28). The region's 59,090 jobs accounted for 15 percent of the state's total jobs, down from the 1969 figure of 18 percent. Approximately 70 percent of the jobs were located in Cascade County, the state's second largest county in both population and total jobs.

Between 1969 and 1979, the region's strong growth in total jobs followed that of the state, with jobs declining only in 1975 when the state experienced essentially no job growth (Figure 2.34). Jobs decline in the region in 1975 was caused by a decline in federal jobs (both military and civilian in Cascade County). A general decline in both total and wage/salary jobs began in 1979, however, while statewide job growth only slowed. Again, the regional decline was related to a decrease in federal jobs at Malmstrom Air Force Base in Cascade County. Between 1982 and 1986, steadfast growth in the number of self-employed was a key factor in sustaining slight growth in total regional jobs. Wage/salary jobs remained constant for most of the 1982-1986 period except for a sharp decline in 1985 (Figure 2.34). More recently, in 1987, wage/salary jobs also improved (Table 2.29).

A shift away from traditional goods-producing industries toward the service oriented sectors characterized the industries of the region between 1969 and 1986. Shares of total jobs in farming, manufacturing, construction, and mining all declined during this period. At the same time, the combined share of services, retail trade, finance/insurance/real estate and wholesale trade increased from 42 percent to 54 percent of wage/salary employment. A substantial decline in government's share of total jobs from 27 percent to 22 percent also took place, most of which represented a decline in military personnel.

Job growth was strong between 1969 and 1979, with only agriculture, manufacturing, and railroads posting declines. Closure of a zinc processing facility in 1973 primarily was responsible for the decrease in manufacturing jobs. These declines, however, were more than offset by strong performance in private health and social services, wholesale trade, retail trade (particularly eating/drinking places), finance/insurance/real estate, and construction.

The large decline in wage/salary jobs that began in 1979 was felt throughout the region. Between 1979 and 1986, every major economic sector (except agriculture) experienced a decline in wage/salary employment. Gains during the 1970s in construction and oil/gas extraction were eliminated. Declines in manufacturing and railroad transportation continued from the 1970s, and the withdrawal of federal government employees (primarily military) cost the region over 1,000 jobs. Losses in wholesale and retail trade were sizable,

and services and finance/insurance/real estate declined slightly.

Table 2.29 illustrates the recent recovery in many sectors of wage/salary employment between 1986 and 1987. Declines in construction, oil/gas extraction, and membership organizations (mainly tribal government) have been offset by gains in services (particularly private health services) and in retail trade (general merchandise stores and automotive dealers/service stations). Based on yearly averages, wage/salary employment grew by 84 jobs between 1986 and 1987. Because of stronger recovery over the course of 1987, however, these averages understate the recent recovery. Between the fourth quarter of 1986 and the fourth quarter of 1987, wage/salary jobs increased by almost 400.

With an unemployment rate of 7.7 percent in 1987, slightly above the statewide average of 7.4 percent, the Great Falls Region ranked ninth in the state. Most of the counties in the region ranked somewhere in the middle of the range, with the exception of Glacier County with high unemployment on the Blackfeet Indian Reservation. Figure 2.36 illustrates the close relationship that has prevailed between the region's unemployment rate and that of the state.

Population

Dominated by the large population of Cascade County, the Great Falls Region ranked second, with a population in 1987 of more than 112,000. This relatively large population resulted from strong growth every decade between 1890 and 1970 (Table 2.8). In 1969, the region was the state's largest, but a general decline in population between 1969 and 1986 of 4 percent (third lowest growth rate in the state) while the rest of the state grew at an average of 17 percent ranked the region second to the Billings Region. Figure 2.35 displays the region's sporadic population performance since 1969.

Income

The Great Falls Region retained its second-place rank in 1986 for total personal income. Its components also ranked second, with the exception of farm earnings, which ranked first in the state. Cascade County ranked second among counties in total personal income, and Chouteau County ranked first in farm earnings.

Changes in total personal income and its components basically have followed statewide trends in the 1980s, as shown in Figures 2.37 and 2.11. The major difference was the relatively stronger declines in farm earnings between 1981 and 1985. Between 1979 and 1986, total personal income declined slightly by about 1 percent (Table 2.28). In fact, this small decline is misleading because 1986 was an exceptional year for growth in agriculture (note the 28 percent growth in personal income for Chouteau County during this period).

Much of this overall decline was the result of a decline in nonfarm earnings between 1979 and 1987 that was related to the losses of wage/salary jobs. At the same time, total personal income during this period reflected fluctuations

in farm earnings. Between 1979 and 1982, dramatic declines in nonfarm earnings occurred before a very small recovery occurred in 1983 and 1984. Also, farm earnings declined sharply after peaking in 1981. As a result, total personal income declined through 1985. Strong recovery in farm earnings in 1986 pushed total personal income up once again despite the continued decline in nonfarm earnings. In 1987, however, farm earnings remained relatively unchanged along with total personal income. During this entire period, property income and transfer payments followed statewide trends and increased moderately.

The Great Falls Region ranked third in the state in per capita income for the 1982–1986 period, a very high ranking considering agriculture’s unstable performance. Cascade County ranked fourth among counties, and Toole County ranked eighth. These two counties and the entire region were consistently above the state average for per capita income between 1979 and 1986. Other counties in this region were generally below the state average, although in exceptionally good agricultural years this did not hold true (Table 2.29).

Agriculture’s influence on this region is evident in per capita income, which increased with farm earnings between 1979 and 1981, and then declined steadily until 1985. The sharp increase in farm earnings in 1986 also was reflected in per capita income which was at its highest level of the 1980s in 1986, about 109 percent of the statewide average.

Figure 2.34

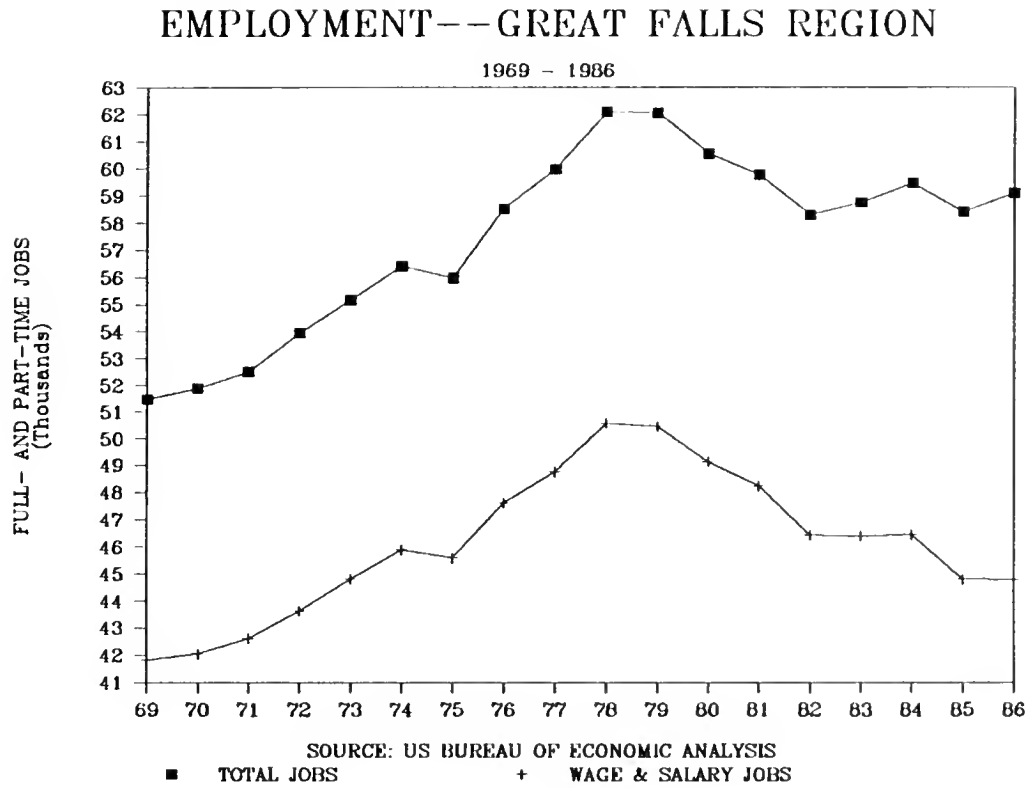


Figure 2.35

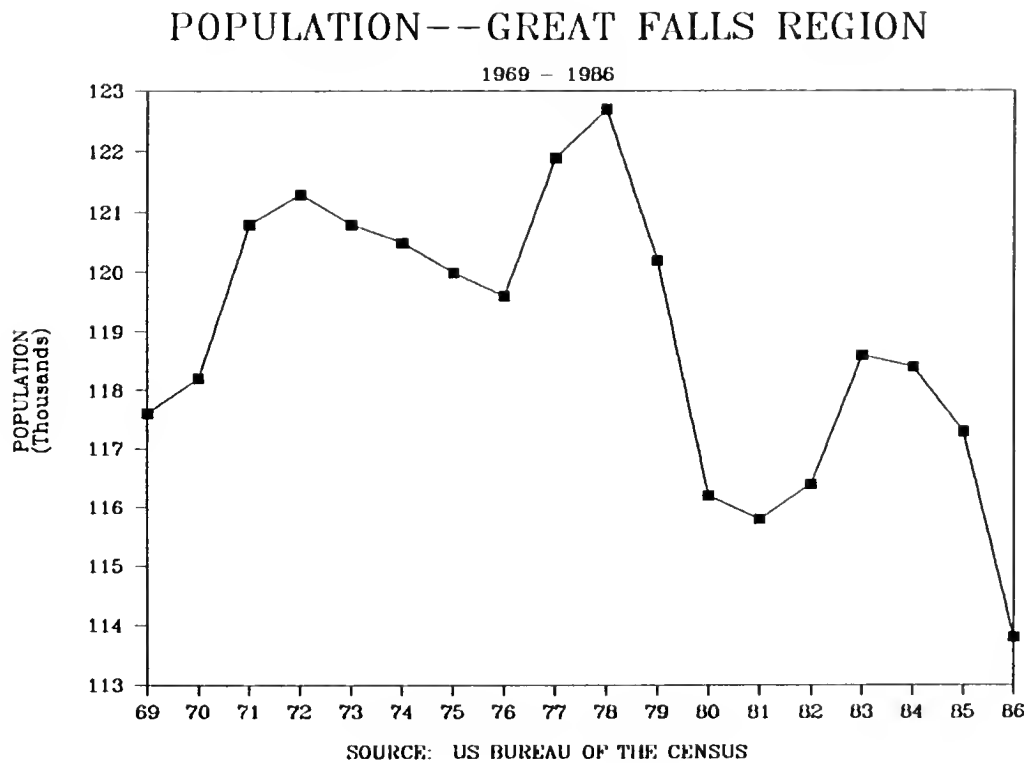


Table 2.28

The Great Falls Region												Rank in State /d
	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986	1987 /p	(Region or County)
Population /a												
Region	114,200	117,600	120,200	116,200	115,800	116,400	118,600	118,400	117,300	113,800	112,900	2
Cascade	72,800	81,200	84,500	80,600	80,200	80,200	81,600	81,400	80,800	78,500	78,100	3
Chouteau	7,300	8,600	8,100	8,100	8,000	8,100	8,200	8,200	8,100	5,900	5,800	32
Glacier	11,500	10,900	10,400	10,700	10,800	11,100	11,200	11,400	11,300	11,100	11,200	19
Pondera	7,600	8,700	8,900	8,700	8,700	8,900	7,000	7,000	8,900	8,700	8,600	29
Teton	7,200	8,200	8,800	8,500	8,500	8,400	8,700	8,600	8,500	8,200	8,100	30
Toole	7,600	8,000	5,500	5,600	5,600	5,700	5,900	5,800	5,700	5,400	5,200	36
Total Jobs /b												
Region	...	51,476	62,059	60,557	59,770	58,293	58,748	59,466	58,402	59,090	...	2
Cascade	...	36,259	43,584	42,249	41,551	40,546	40,912	41,578	40,908	41,516	...	2
Chouteau	...	3,043	2,919	2,807	2,892	2,842	2,885	2,841	2,775	2,855	...	33
Glacier	...	4,079	6,002	4,052	5,667	5,474	5,502	5,483	5,305	5,333	...	19
Pondera	...	2,611	3,281	3,216	3,222	3,159	3,233	3,208	3,174	3,157	...	27
Teton	...	2,692	2,932	2,930	3,106	3,076	3,039	3,103	3,002	3,028	...	30
Toole	...	2,792	3,341	3,303	3,332	3,196	3,177	3,253	3,238	3,205	...	26
Wage & Salary Jobs /b												
Region	...	41,817	50,464	49,141	48,237	46,442	46,400	46,448	44,804	44,799	...	2
Cascade	...	32,211	37,499	36,136	35,325	33,992	34,086	34,230	33,131	33,257	...	2
Chouteau	...	1,458	1,656	1,620	1,687	1,654	1,637	1,583	1,496	1,543	...	35
Glacier	...	3,285	4,984	5,018	4,632	4,424	4,420	4,374	4,151	4,120	...	16
Pondera	...	1,542	2,279	2,247	2,301	2,242	2,291	2,266	2,210	2,161	...	26
Teton	...	1,464	1,694	1,727	1,888	1,859	1,739	1,777	1,649	1,632	...	34
Toole	...	1,857	2,350	2,393	2,404	2,271	2,227	2,218	2,167	2,086	...	27
Unemployment Rate /c												
Region	...	4.0%	5.7%	6.6%	7.2%	8.0%	8.7%	7.5%	8.0%	8.0%	7.7%	9
Cascade	...	4.1%	6.2%	7.3%	8.0%	8.4%	9.0%	7.3%	7.9%	7.7%	7.5%	33
Chouteau	...	2.1%	2.2%	2.4%	2.1%	3.6%	4.8%	4.4%	5.7%	6.6%	5.5%	15
Glacier	...	5.8%	7.8%	8.5%	12.1%	11.8%	11.4%	12.3%	12.0%	11.5%	11.9%	54
Pondera	...	3.7%	3.7%	4.2%	3.3%	5.4%	6.3%	6.7%	8.8%	7.1%	7.3%	31
Teton	...	2.8%	3.5%	3.6%	3.3%	5.3%	5.9%	6.8%	5.5%	5.9%	5.2%	11
Toole	...	4.1%	4.0%	4.0%	3.5%	8.6%	8.0%	6.6%	7.3%	9.8%	8.7%	24
Total Personal Income (\$1000s) /b												
Region	902,025	1,199,765	1,548,417	1,518,020	1,537,085	1,496,167	1,495,825	1,487,650	1,450,063	1,534,802	1,520,000	2
Cascade	609,753	837,141	1,119,886	1,075,526	1,060,146	1,051,234	1,068,158	1,090,540	1,070,466	1,081,160	...	2
Chouteau	65,118	79,774	67,472	67,624	91,524	81,965	76,925	66,425	64,113	66,062	...	26
Glacier	66,446	88,278	135,232	139,793	131,837	129,220	124,277	120,117	116,012	127,556	...	17
Pondera	53,697	68,109	74,506	77,955	85,224	80,788	76,967	71,308	65,074	81,788	...	28
Teton	52,809	64,515	73,049	75,789	84,690	76,556	74,229	70,262	67,284	82,453	...	27
Toole	54,200	61,948	78,273	81,333	83,665	76,404	75,265	68,999	67,113	75,785	...	32
Per Capita Personal Income /b												
Region	7,899	10,205	12,887	13,066	13,267	12,863	12,622	12,567	12,369	13,495	13,500	3
Cascade	8,376	10,312	13,257	13,340	13,222	13,113	13,096	13,396	13,251	13,775	...	4
Chouteau	8,920	12,154	11,001	11,111	15,138	13,341	12,316	10,788	10,582	14,604	...	13
Glacier	5,778	8,111	13,029	13,102	12,199	11,674	11,066	10,512	10,262	11,465	...	30
Pondera	7,065	10,149	10,841	11,582	12,686	11,765	11,070	10,200	9,485	12,249	...	31
Teton	7,335	10,388	10,807	11,667	13,024	11,951	11,156	10,588	10,347	13,342	...	24
Toole	6,949	10,297	14,144	14,599	14,919	13,482	12,859	11,977	11,733	14,050	...	8
Nonfarm Earnings (\$1000s) /b												
Region	633,912	821,848	1,107,929	1,058,989	992,306	949,782	952,793	963,413	938,002	925,752	915,000	2
Cascade	488,167	662,913	848,149	781,992	749,466	728,129	735,594	743,388	724,993	716,411	...	3
Chouteau	17,007	17,086	25,098	23,596	24,400	22,458	22,023	20,877	20,661	21,174	...	39
Glacier	50,553	61,414	110,881	112,482	97,812	89,427	86,325	89,171	84,175	80,400	...	18
Pondera	27,589	23,740	37,800	36,047	35,379	34,620	35,842	36,219	37,256	35,841	...	28
Teton	19,886	24,530	34,843	33,833	35,522	33,000	31,048	32,125	29,587	29,554	...	33
Toole	30,711	32,166	51,157	51,039	49,728	41,949	41,960	41,634	41,310	40,372	...	27
Farm Earnings (\$1000s) /b												
Region	109,130	147,580	30,176	66,070	91,771	65,603	48,007	13,798	(7,185)	86,203	81,000	1
Cascade	19,978	29,954	13,973	15,743	9,244	7,022	9,349	11,669	1,363	16,805	...	4
Chouteau	34,400	40,977	7,037	7,602	28,747	18,854	13,174	3,723	2,637	24,410	...	1
Glacier	5,172	9,009	5,627	13,015	13,574	13,980	8,575	234	(1,075)	12,284	...	10
Pondera	14,577	26,820	5,275	8,471	13,566	8,507	3,596	(4,100)	(9,564)	8,306	...	22
Teton	20,925	22,699	8,122	10,621	14,893	8,625	6,337	1,805	211	15,748	...	6
Toole	14,077	18,120	9,942	10,617	11,747	8,816	6,976	467	(757)	8,649	...	21
Property Income (\$1000s) /b												
Region	115,767	158,288	227,134	236,653	267,019	280,665	282,735	295,176	294,313	294,066	289,000	2
Cascade	76,495	102,992	139,621	145,199	164,621	172,709	172,525	183,818	186,210	186,467	...	2
Chouteau	10,392	13,926	23,264	23,894	26,605	26,985	27,371	26,564	25,845	25,713	...	20
Glacier	8,156	8,703	14,355	14,143	15,468	18,294	18,615	19,376	19,661	19,606	...	26
Pondera	8,102	12,241	17,690	18,996	21,480	22,037	22,416	23,471	21,841	21,739	...	24
Teton	8,039	11,804	18,825	19,815	22,119	22,694	23,825	23,397	23,305	23,151	...	21
Toole	4,582	8,621	13,379	14,605	16,727	17,945	17,982	18,349	17,452	17,330	...	29
Transfer Payments (\$1000s) /b												
Region	63,679	114,968	214,645	223,489	233,252	244,253	256,463	260,373	270,477	278,985	280,000	2
Cascade	41,499	78,955	153,371	159,564	165,597	172,629	182,192	183,507	190,653	196,645	...	2
Chouteau	3,899	4,501	9,745	10,625	11,115	12,078	12,112	12,212	12,296	12,433	...	34
Glacier	6,345	12,399	20,706	21,580	22,104	22,636	24,412	25,604	26,573	27,266	...	16
Pondera	3,829	5,966	11,033	11,077	12,145	13,140	13,278	13,793	14,564	14,884	...	30
Teton	3,862	5,786	10,802	11,264	12,355	12,939	13,249	13,606	14,237	14,586	...	31
Toole	4,244	5,561	8,987	9,559	9,916	10,811	11,622	11,652	12,353	12,971	...	32

/a U.S. Bureau of the Census

/b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average)

/e 1987 data consists of preliminary estimates.

Table 2.29

INDUSTRY	SIC** CODE	1986	1987	CHANGE	PERCENT CHANGE
Total Wage and Salary Employment		34,909	34,993	84	0.2%
Total Private		26,772	26,783	11	0.0%
Agriculture, Forestry, Fishing, Hunting, & Trapping		390	381	(9)	-2.3%
Agricultural Production--Crops ***	01	117	110	(7)	-6.0%
Agricultural Production--Livestock ***	02	131	117	(14)	-10.7%
Agricultural Services	07	139	151	12	8.6%
Forestry	08				
Fishing, Hunting, and Trapping	09				
Mining		*0*	327	*0*	*0*
Metal Mining	10		*0*		
Coal Mining	12				
Oil and Gas Extraction	13	399	323	(76)	-19.0%
Mining of Non-Metallic Minerals, Except Fuels	14	*0*	*0*		
Construction		1,495	1,320	(175)	-11.7%
General Building Contractors	15	393	325	(68)	-17.3%
Heavy Construction Contractors	16	538	430	(108)	-20.1%
Special Trade Contractors	17	560	558	(2)	-0.4%
Manufacturing		1,392	1,256	(136)	-9.8%
Food and Kindred Products	20	498	388	(110)	-22.1%
Textile Mill Products	22				
Apparel and Other Textile Products	23	17	*0*	*0*	*0*
Lumber and Wood Products	24	18	42	24	133.3%
Furniture and Fixtures	25	*0*		*0*	*0*
Paper and Allied Products	26	*0*	*0*	*0*	*0*
Printing and Publishing	27	330	332	2	0.6%
Chemicals and Allied Products	28	75	82	7	9.3%
Petroleum Refining and Related Industries	29	*0*	*0*	*0*	*0*
Rubber and Miscellaneous Plastic Products	30	18	22	4	22.2%
Leather and Leather Products	31	*0*	*0*	*0*	*0*
Stone, Clay, Glass, and Concrete Products	32	119	54	(65)	-54.6%
Primary Metals Processing	33	*0*	*0*	*0*	*0*
Fabricated Metal Products	34	*0*	*0*	*0*	*0*
Machinery, Except Electrical	35	9	8	(1)	-11.1%
Electrical and Electronic Equipment	36				
Transportation Equipment	37	38	46	8	21.1%
Instruments and Related Products	38	*0*	*0*	*0*	*0*
Miscellaneous Manufacturing Industries	39	66	75	9	13.6%
Transportation and Public Utilities		2,024	*0*	*0*	*0*
Local and Interurban Passenger Transit	41	178	175	(3)	-1.7%
Trucking and Warehousing	42	668	667	(1)	-0.1%
Water Transportation	44		*0*	*0*	*0*
Transportation by Air	45	129	161	32	24.8%
Pipelines, Except Natural Gas	46				
Transportation Services	47	110	107	(3)	-2.7%
Communications	48	396	379	(17)	-4.3%
Electric, Gas, and Sanitary Services	49	535	519	(16)	-3.0%
Wholesale Trade		2,310	2,315	5	0.2%
Durable Goods	50	1,226	1,169	(57)	-4.6%
Nondurable Goods	51	1,081	1,143	62	5.7%
Retail Trade		7,711	7,802	91	1.2%
Building Materials and Hardware	52	334	303	(31)	-9.3%
General Merchandise Stores	53	1,077	1,206	129	12.0%
Food Stores	54	1,244	1,210	(34)	-2.7%
Automotive Dealers and Service Stations	55	977	1,034	57	5.8%
Apparel and Accessory Stores	56	394	384	(10)	-2.5%
Furniture and Home Furnishings Stores	57	340	335	(5)	-1.5%
Eating and Drinking Places	58	2,524	2,522	(2)	-0.1%
Miscellaneous Retail	59	804	790	(14)	-1.7%
Finance, Insurance, and Real Estate		2,233	2,215	(18)	-0.8%
Banking	60	631	602	(29)	-4.6%
Credit Agencies other than Banks	61	298	316	18	6.0%
Security, Commodity Brokers, and Services	62	156	158	2	1.3%
Insurance Carriers	63	383	380	(3)	-0.8%
Insurance Agents, Brokers, and Services	64	333	333	0	0.0%
Real Estate	65	375	383	8	2.1%
Combined Real Estate, Insurance, Etc.	66	22	21	(1)	-4.5%
Holding and Other Investment Offices	67	24	13	(11)	-45.8%
Services		8,795	9,120	325	3.7%
Hotels and Other Lodging Places	70	1,077	1,103	26	2.4%
Personal Services	72	435	420	(15)	-3.4%
Business Services	73	671	689	18	2.7%
Auto Repair, Services, and Garages	75	268	268	0	0.0%
Miscellaneous Repair Services	76	71	78	7	9.9%
Motion Pictures	78	96	91	(5)	-5.2%
Amusement and Recreation Services	79	296	322	26	8.8%
Private Health Services	80	3,183	3,404	221	6.9%
Legal Services	81	316	355	39	12.3%
Private Educational Services	82	370	380	10	2.7%
Private Social Services	83	719	745	26	3.6%
Museums, Art Galleries, Etc.	84	29	35	6	20.7%
Membership Organizations Including Tribal Gov't	86	789	683	(106)	-13.4%
Private Households	88	60	50	(10)	-16.7%
Engineering, Accounting, and Other Services	89	387	472	85	22.0%
Non-Classifiable	99	*0*	*0*	*0*	*0*
Government		8,135	8,206	71	0.9%
State		709	686	(23)	-3.2%
Local		5,153	5,177	24	0.5%
Federal		2,269	2,340	71	3.1%

*Includes only employment covered by the Unemployment Insurance Program.

**Standard Industrial Classification

***These values represent a very small portion of wage/salary employment for this industry.

0 indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.36

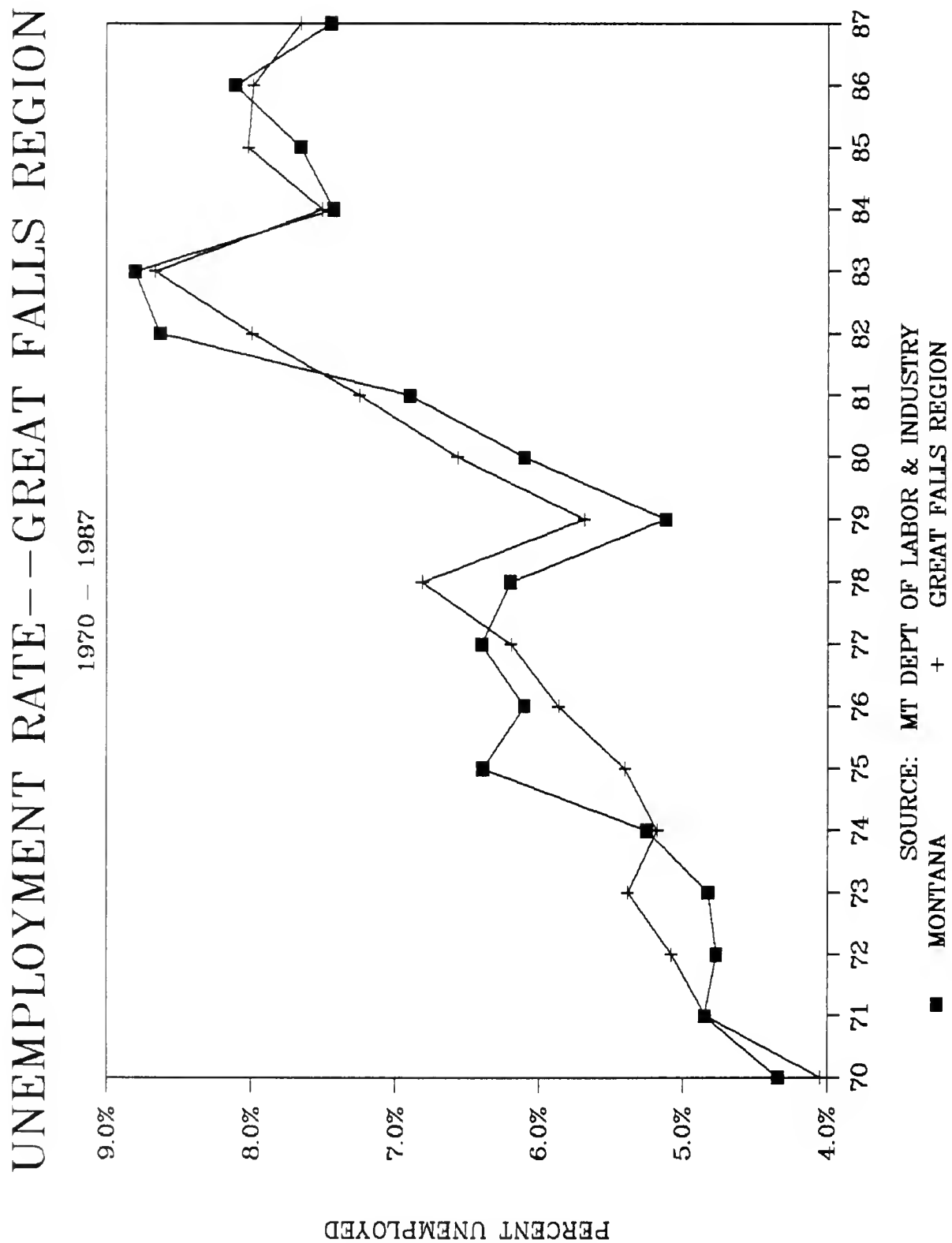
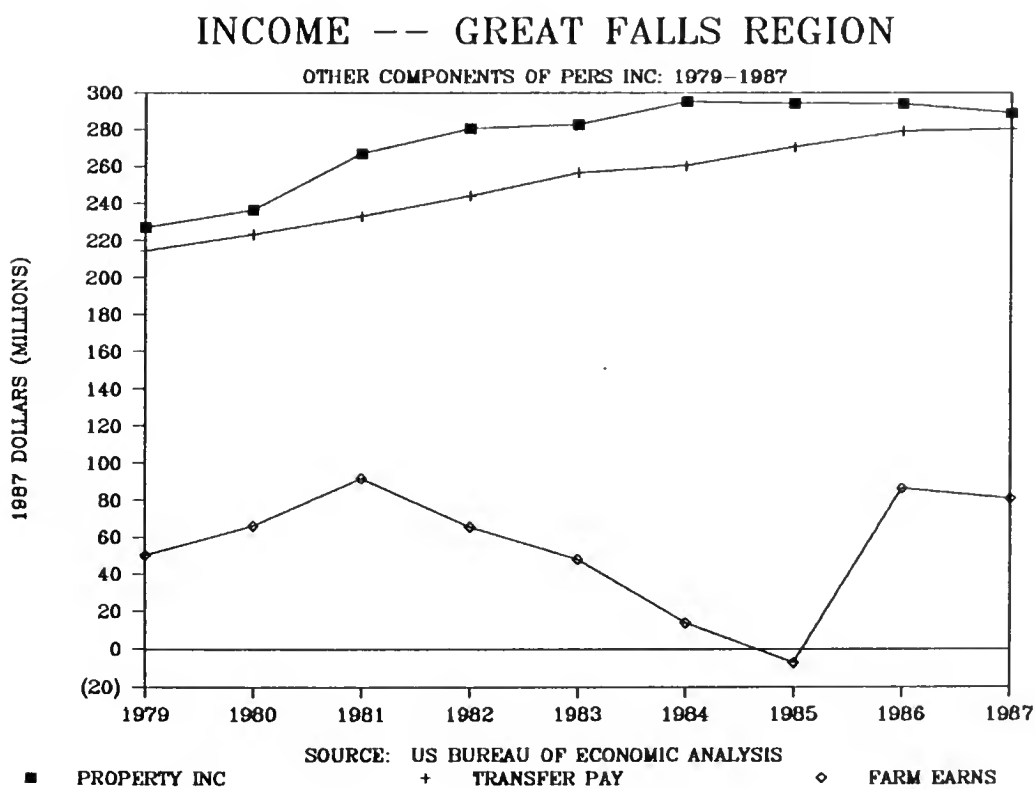
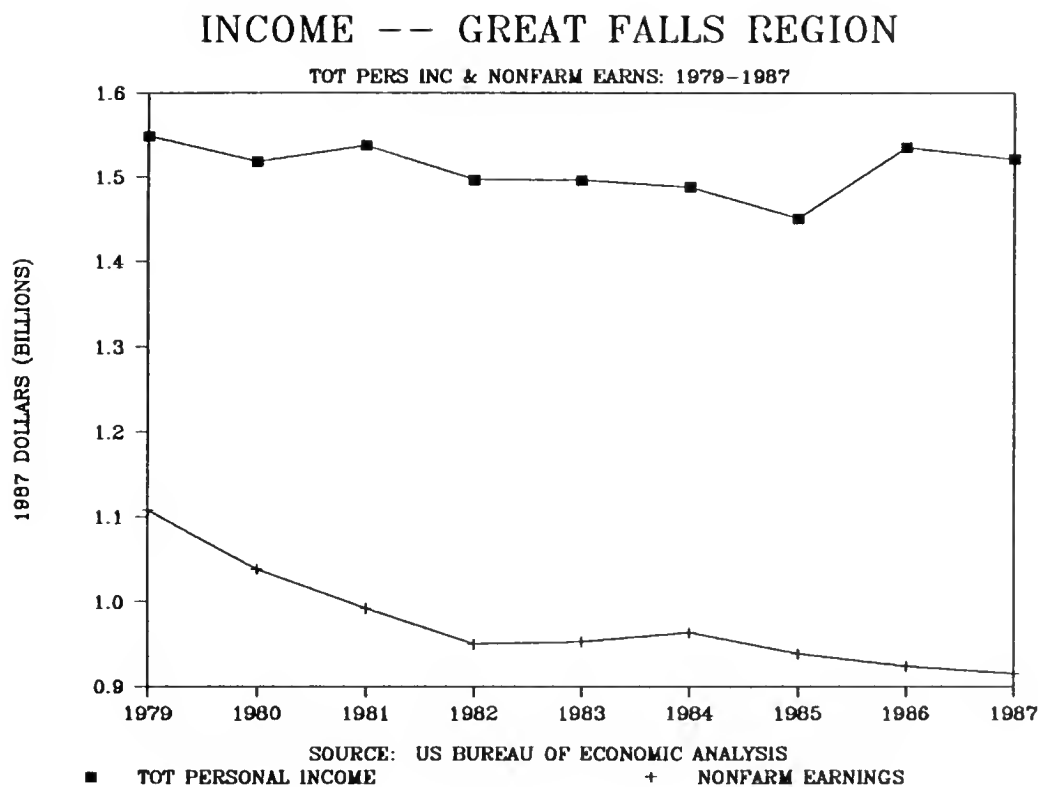


Figure 2.37



The Havre Region

Located in the central portion of northern Montana, the Havre Region includes Blaine, Hill, and Liberty counties.

Labor Force

In 1986, the Havre Region had the second smallest number of jobs in the state, about 13,000, or 3.2 percent, down from 3.9 percent in 1960. Most jobs were in Hill County, which ranked eighth in the state for total jobs (Table 2.30).

During the 1970s, both total and wage/salary jobs increased steadily (Figure 2.38). Then, beginning with the national and statewide recessions in 1980, total jobs declined gradually to the 1986 level. Between 1969 and 1986, total jobs posted a net increase of 16 percent, but during 1979-1986, they declined by 9 percent. The decline was primarily in wage/salary jobs, which fell by 16 percent, while self-employment (which accounts for about 30 percent of total jobs in the region) increased by 12 percent during the same period (Table 2.5). Between 1986 and 1987, the decline in wage/salary jobs continued (Table 2.31).

The largest industries in this region include services, retail trade, government, agriculture, and transportation/public utilities. Between 1969 and 1986, services and retail trade increased their share of wage/salary employment, while the shares of government, agriculture, and transportation/public utilities decreased. The decline in agriculture was sharpest, with its share in total jobs (including the self-employed) falling from 24 percent to 16 percent. However, since agriculture's average share of total jobs statewide in 1986 was 9 percent, it remains a very important regional industry.

Strong employment growth of the 1970s (Figure 2.38) characterized every sector in the Havre Region with the exception of agriculture, which declined throughout the state. Growth was particularly strong in railroad transportation, construction, eating/drinking places and other retail trade establishments, wholesale trade, private business and health services, and machinery manufacturing.

Similarly, the decline in total jobs between 1979 and 1986 also was felt throughout the region's industries. Declines in railroad transportation, construction, manufacturing, wholesale and most of retail trade, and services eroded much of the gain that had been made in the 1970s. Sector growth during this time period was very rare, with state government (Northern Montana College) and food stores as the only industries with significant growth in wage/salary employment.

More recently, however, several sectors in the region have begun to improve (Table 2.31). Between 1986 and 1987, wage/salary jobs in retail trade, wholesale trade, and services increased significantly. Declines in other sectors, such as heavy construction contractors and manufacturing, were large, but as a whole, the region lost fewer than 50 wage/salary jobs.

Prior to 1979, the unemployment rate was substantially less than the statewide average. Figure 2.40 shows that unemployment rates in the 1980s have been higher for the region than the 1970s. In 1987, the 7.4 percent unemployment rate of the Havre Region equaled the Montana average, which was the case since 1979. Reasons for this situation are not totally clear, but obviously are related to the overall employment decline in the region since 1979, and perhaps to a reluctance of unemployed persons to migrate out of the region.

Population

Population of the Havre Region--the state's second smallest--totaled about 27,000 in 1987, mostly located in Hill County (Table 2.30). Since population data was first gathered for the 1920s, regional population has remained relatively steady, with an increase during the 1950s basically being offset in the 1960s (Table 2.8). Figure 2.39 illustrates these same fluctuations around the 27,000 mark since 1969, with periods of growth offsetting periods of decline.

Income

Total regional personal income ranked 11th in 1986, consistent with the ranks of population and total jobs. In general, the components of personal income also were near this mark, with the exception of farm earnings, which ranked fourth in the state. Hill, Liberty, and Blaine counties all ranked very high in farm earnings in 1986.

Changes in total personal income between 1979 and 1987 involved two factors: steady decline of nonfarm worker earnings and volatility of farm earnings. Following the pattern of nonfarm (and total) wage/salary jobs, nonfarm worker earnings decreased steadily throughout this period (Figure 2.41). At the same time, agricultural earnings were very unsteady, peaking in 1981 before declining sharply and becoming negative by 1985, partly because of drought (Figure 2.38). Dramatic recovery in farm earnings in 1986 translated into a strong increase in total personal income. But zero growth in 1987 farm earnings caused the decline of nonfarm earnings and consequently affected total personal income. Overall, between 1979 and 1987, farm earnings increased substantially, but steady declines in nonfarm earnings in conjunction with little growth in property income and transfer payments resulted in very little growth in total personal income.

Per capita income in the Havre Region ranked ninth out of the 12 regions for the 1982-1986 period. In the county ranking, Liberty County ranked second, Blaine County ranked 53rd, and Hill County ranked 20th.

Figure 2.38

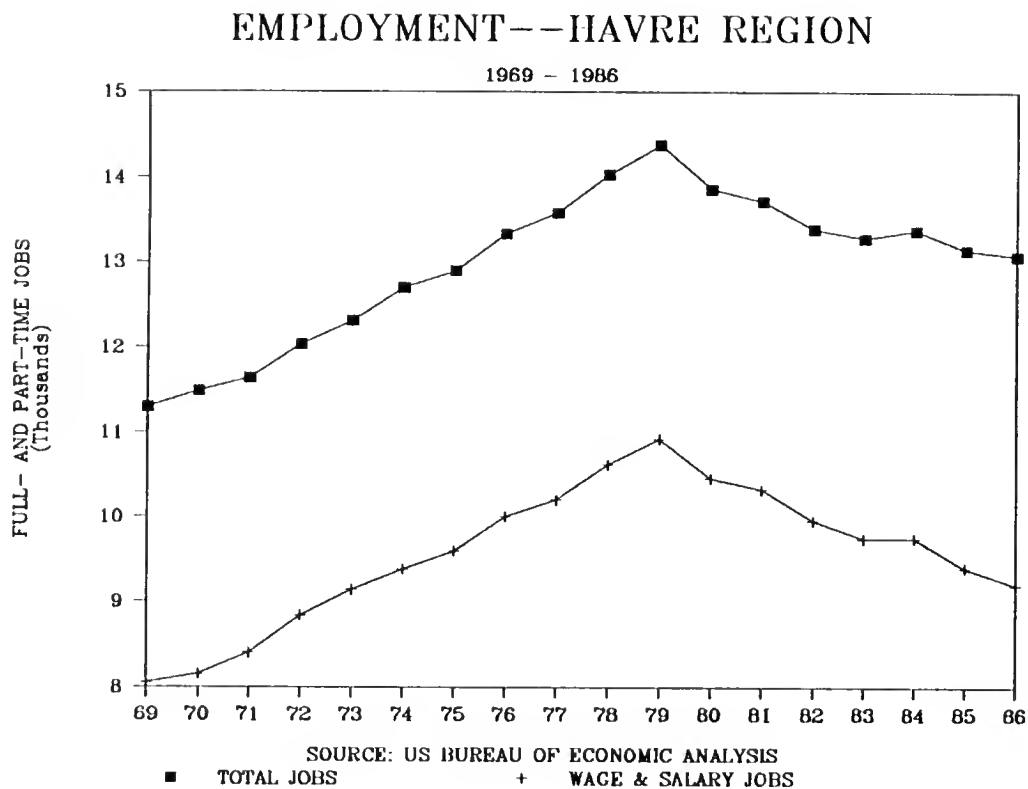


Figure 2.39

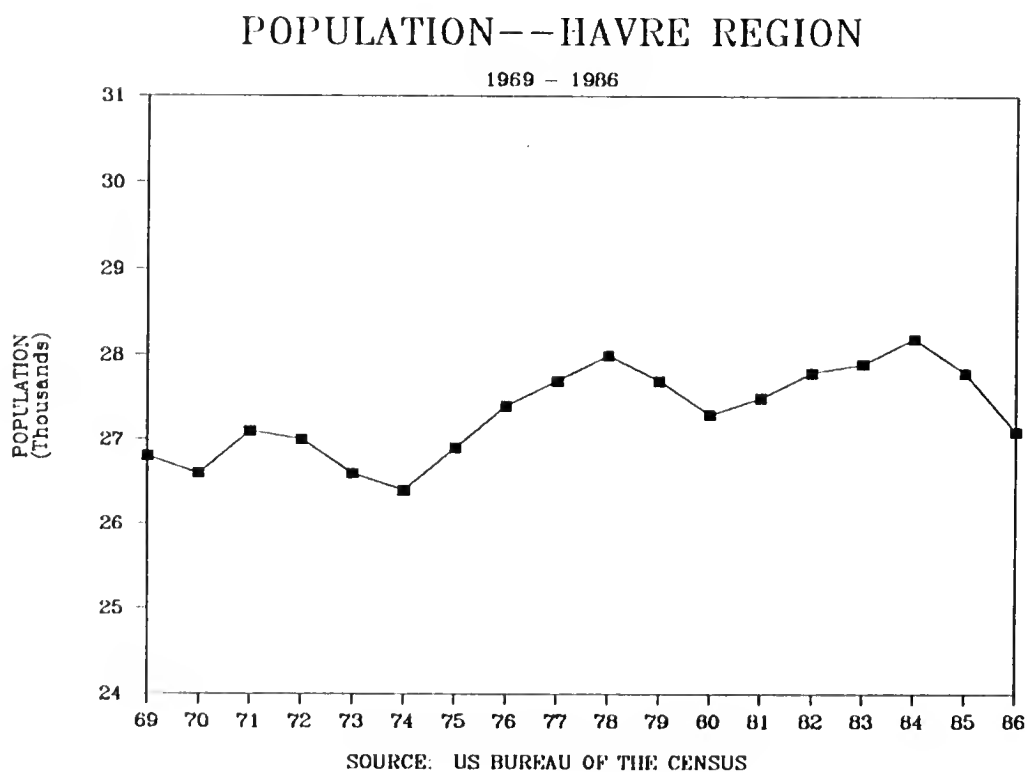


Table 2.30

	The Havre Region											Rank in State /d (Region or County)
	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986	1987 /p	
<hr/>												
Population /a												
Region	29,100	26,800	27,700	27,300	27,500	27,800	27,900	28,200	27,800	27,100	27,000	11
Blaine	8,000	6,900	7,200	7,000	6,900	6,900	6,900	7,100	7,100	7,000	6,900	27
Hill	18,500	17,500	18,100	18,000	18,200	18,500	18,600	18,500	18,200	17,800	17,800	11
Liberty	2,600	2,400	2,400	2,300	2,400	2,400	2,400	2,600	2,500	2,300	2,300	47
Total Jobs /b												
Region	...	11,302	14,380	13,858	13,713	13,389	13,280	13,372	13,138	13,074	...	11
Blaine	...	2,648	3,092	2,874	2,869	2,808	2,828	2,932	2,998	2,955	...	32
Hill	...	7,482	10,057	9,760	9,650	9,395	9,260	9,241	8,960	8,950	...	8
Liberty	...	1,172	1,231	1,224	1,208	1,188	1,192	1,199	1,180	1,189	...	47
Wage & Salary Jobs /b												
Region	...	8,055	10,925	10,459	10,326	9,955	9,748	9,750	9,401	9,197	...	11
Blaine	...	1,687	2,109	1,921	1,907	1,839	1,839	1,921	1,975	1,886	...	29
Hill	...	5,786	8,033	7,738	7,651	7,337	7,138	7,069	6,696	6,584	...	8
Liberty	...	582	781	800	788	779	771	760	730	727	...	44
Unemployment Rate /c												
Region	...	4.2%	4.7%	6.2%	6.7%	7.8%	8.1%	7.4%	7.6%	8.3%	7.4%	7
Blaine	...	5.1%	6.9%	8.6%	8.8%	9.3%	9.4%	8.8%	8.6%	10.9%	9.3%	46
Hill	...	4.0%	4.2%	5.8%	6.4%	7.7%	8.1%	7.1%	7.3%	7.7%	7.0%	27
Liberty	...	3.3%	5.2%	5.1%	3.4%	4.5%	4.0%	5.2%	5.0%	4.6%	4.3%	4
Total Personal Income (\$1000s) /b												
Region	219,122	246,563	325,932	325,294	353,225	327,178	322,628	302,725	289,233	340,155	334,000	11
Blaine	45,617	49,319	69,279	65,379	72,151	64,497	65,253	62,264	59,615	72,187	...	34
Hill	146,724	166,907	226,508	226,938	242,077	227,675	222,992	213,102	202,640	227,524	...	9
Liberty	28,780	30,338	30,145	32,977	38,997	35,006	36,383	27,359	26,977	40,444	...	41
Per Capita Personal Income /b												
Region	7,530	9,225	11,787	11,885	12,815	11,742	11,544	10,737	10,395	12,527	12,400	9
Blaine	5,702	7,182	9,571	9,350	10,386	9,319	9,172	8,794	8,348	10,257	...	53
Hill	7,823	9,551	12,549	12,576	13,271	12,289	11,984	11,489	11,128	12,787	...	20
Liberty	11,069	12,717	12,757	14,099	16,413	14,483	14,881	10,662	10,909	17,410	...	2
Nonfarm Earnings (\$1000s) /b												
Region	115,747	135,155	217,333	204,055	193,859	185,893	182,314	183,488	177,676	174,759	171,000	11
Blaine	20,200	21,892	34,097	30,747	29,590	28,498	29,558	30,647	31,670	30,247	...	32
Hill	85,881	104,542	170,917	161,442	152,779	146,168	141,629	141,486	134,925	133,447	...	8
Liberty	7,666	8,721	12,318	11,866	11,490	11,227	11,127	11,355	11,082	11,064	...	45
Farm Earnings (\$1000s) /b												
Region	64,981	54,684	17,297	23,596	51,595	26,415	23,800	(608)	(8,573)	44,182	44,000	4
Blaine	13,184	12,693	8,189	6,189	12,844	4,378	1,912	(1,209)	(4,523)	9,107	...	19
Hill	33,382	27,100	3,875	9,469	25,307	12,732	11,154	(700)	(5,054)	20,423	...	3
Liberty	16,416	14,891	5,232	7,939	13,443	9,305	10,733	1,301	1,004	14,652	...	7
Property Income (\$1000s) /b												
Region	29,472	38,441	58,633	61,783	70,297	72,975	72,116	75,257	74,647	73,802	72,000	12
Blaine	5,487	7,741	13,577	13,952	15,284	16,382	16,277	18,554	18,302	16,244	...	32
Hill	19,749	25,450	36,992	39,194	45,280	46,744	46,319	49,193	48,361	47,645	...	10
Liberty	4,236	5,243	8,064	8,637	9,733	9,849	9,520	9,510	9,984	9,913	...	40
Transfer Payments (\$1000s) /b												
Region	15,590	25,780	46,897	49,100	50,772	55,090	57,016	57,482	58,826	61,008	61,000	11
Blaine	5,194	7,686	12,806	13,411	13,544	14,279	14,509	15,211	15,742	16,285	...	28
Hill	9,364	16,404	30,477	32,011	33,598	36,641	37,921	37,611	38,480	39,973	...	10
Liberty	1,032	1,690	3,614	3,677	3,630	4,169	4,586	4,660	4,604	4,730	...	47

/a U.S. Bureau of the Census

/b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average)

/p 1987 data consists of preliminary estimates.

Table 2.31

WAGE & SALARY EMPLOYMENT IN THE HAYRE REGION*: 1986-1987

INDUSTRY	SIC** CODE	1986	1987	CHANGE	PERCENT CHANGE
Total Wage and Salary Employment		6,945	6,897	(48)	-0.7%
Total Private		4,785	4,749	(36)	-0.8%
Agriculture, Forestry, Fishing, Hunting, & Trapping		120	113	(7)	-5.8%
Agricultural Production--Crops ***	01	45	41	(4)	-8.9%
Agricultural Production--Livestock ***	02	24	19	(5)	-20.8%
Agricultural Services	07	49	51	2	4.1%
Forestry	08				
Fishing, Hunting, and Trapping	09				
Mining		E 59	E 42	E (17)	E -28.8%
Metal Mining	10				
Coal Mining	12				
Oil and Gas Extraction	13	59	42	(17)	-28.8%
Mining of Non-Metallic Minerals, Except Fuels	14	"0"	"0"	"0"	"0"
Construction		293	203	(90)	-30.7%
General Building Contractors	15	42	43	1	2.4%
Heavy Construction Contractors	16	153	61	(92)	-60.1%
Special Trade Contractors	17	95	95	0	0.0%
Manufacturing		201	159	(42)	-20.9%
Food and Kindred Products	20	"0"	55	"0"	"0"
Textile Mill Products	22				
Apparel and Other Textile Products	23				
Lumber and Wood Products	24		"0"	"0"	"0"
Furniture and Fixtures	25				
Paper and Allied Products	26				
Printing and Publishing	27	48	45	(3)	-6.3%
Chemicals and Allied Products	28	19	19	0	0.0%
Petroleum Refining and Related Industries	29				
Rubber and Miscellaneous Plastic Products	30				
Leather and Leather Products	31				
Stone, Clay, Glass, and Concrete Products	32	38	28	(10)	-26.3%
Primary Metals Processing	33				
Fabricated Metal Products	34				
Machinery, Except Electrical	35	"0"	"0"	"0"	"0"
Electrical and Electronic Equipment	36				
Transportation Equipment	37				
Instruments and Related Products	38	"0"	"0"	"0"	"0"
Miscellaneous Manufacturing Industries	39	"0"	"0"	"0"	"0"
Transportation and Public Utilities		283	"0"	"0"	"0"
Local and Interurban Passenger Transit	41	11	7	(4)	-36.4%
Trucking and Warehousing	42	57	61	4	7.0%
Water Transportation	44				
Transportation by Air	45	"0"	8	"0"	"0"
Pipelines, Except Natural Gas	46				
Transportation Services	47	"0"	"0"	"0"	"0"
Communications	48	50	48	(2)	-4.0%
Electric, Gas, and Sanitary Services	49	146	143	(3)	-2.1%
Wholesale Trade		266	309	43	16.2%
Durable Goods	50	133	180	47	35.3%
Nondurable Goods	51	133	129	(4)	-3.0%
Retail Trade		1,482	1,541	59	4.0%
Building Materials and Hardware	52	66	64	(2)	-3.0%
General Merchandise Stores	53	145	171	26	17.9%
Food Stores	54	291	292	1	0.3%
Automotive Dealers and Service Stations	55	187	189	2	1.1%
Apparel and Accessory Stores	56	78	86	8	10.3%
Furniture and Home Furnishings Stores	57	36	33	(3)	-8.3%
Eating and Drinking Places	58	551	578	27	4.9%
Miscellaneous Retail	59	121	118	(3)	-2.5%
Finance, Insurance, and Real Estate		296	"0"	"0"	"0"
Banking	60	126	119	(7)	-5.6%
Credit Agencies other than Banks	61	48	49	1	2.1%
Security, Commodity Brokers, and Services	62	"0"	7	"0"	"0"
Insurance Carriers	63	"0"	"0"	"0"	"0"
Insurance Agents, Brokers, and Services	64	42	40	(2)	-4.8%
Real Estate	65	66	64	(2)	-3.0%
Combined Real Estate, Insurance, Etc.	66				
Holding and Other Investment Offices	67				
Services		E 1,751	E 1,787	E 36	E 2.1%
Hotels and Other Lodging Places	70	126	121	(5)	-4.0%
Personal Services	72	80	86	6	7.5%
Business Services	73	84	106	22	26.2%
Auto Repair, Services, and Garages	75	49	52	3	6.1%
Miscellaneous Repair Services	76	28	24	(4)	-14.3%
Motion Pictures	78	27	29	2	7.4%
Amusement and Recreation Services	79	43	39	(4)	-9.3%
Private Health Services	80	623	637	14	2.2%
Legal Services	81	61	61	0	0.0%
Private Educational Services	82	96	108	12	12.5%
Private Social Services	83	210	227	17	8.1%
Museums, Art Galleries, Etc.	84	"0"	"0"	"0"	"0"
Membership Organizations Including Tribal Gov't	86	245	221	(24)	-9.8%
Private Households	88	13	13	0	0.0%
Engineering, Accounting, and Other Services	89	66	63	(3)	-4.5%
Non-Classifiable	99	2		(2)	-100.0%
Government		2,158	2,146	(12)	-0.6%
State		405	382	(23)	-5.7%
Local		1,389	1,377	(12)	-0.9%
Federal		361	384	23	6.4%

*Includes only employment covered by the Unemployment Insurance Program.

**Standard Industrial Classification

***These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.40

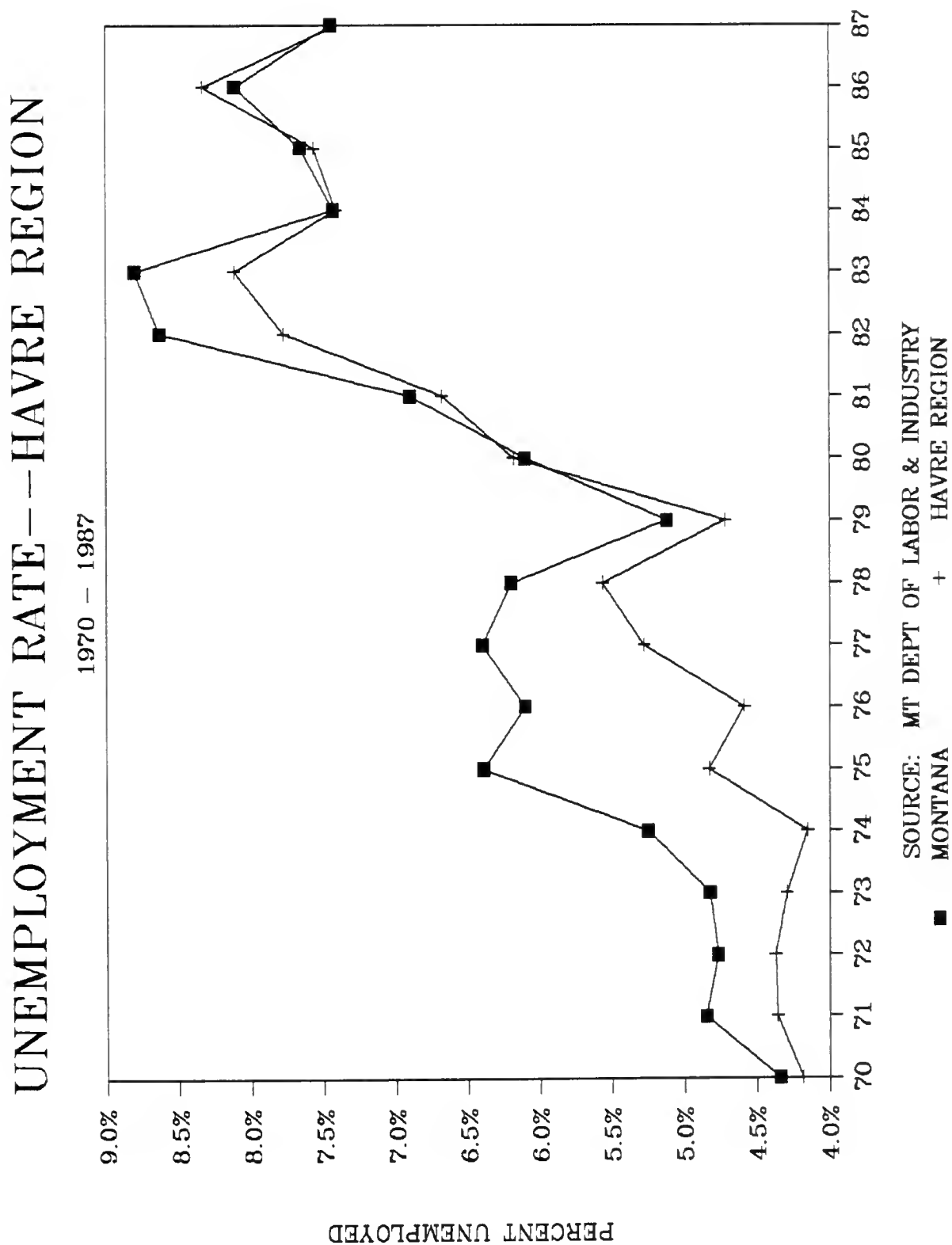
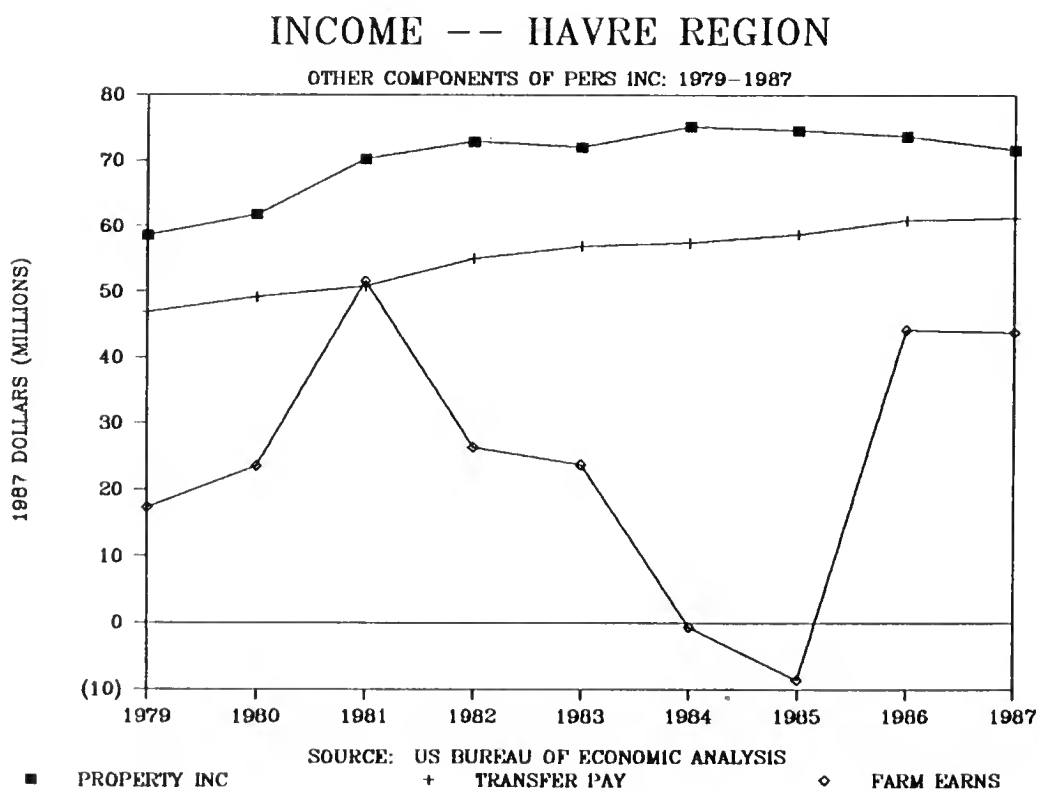
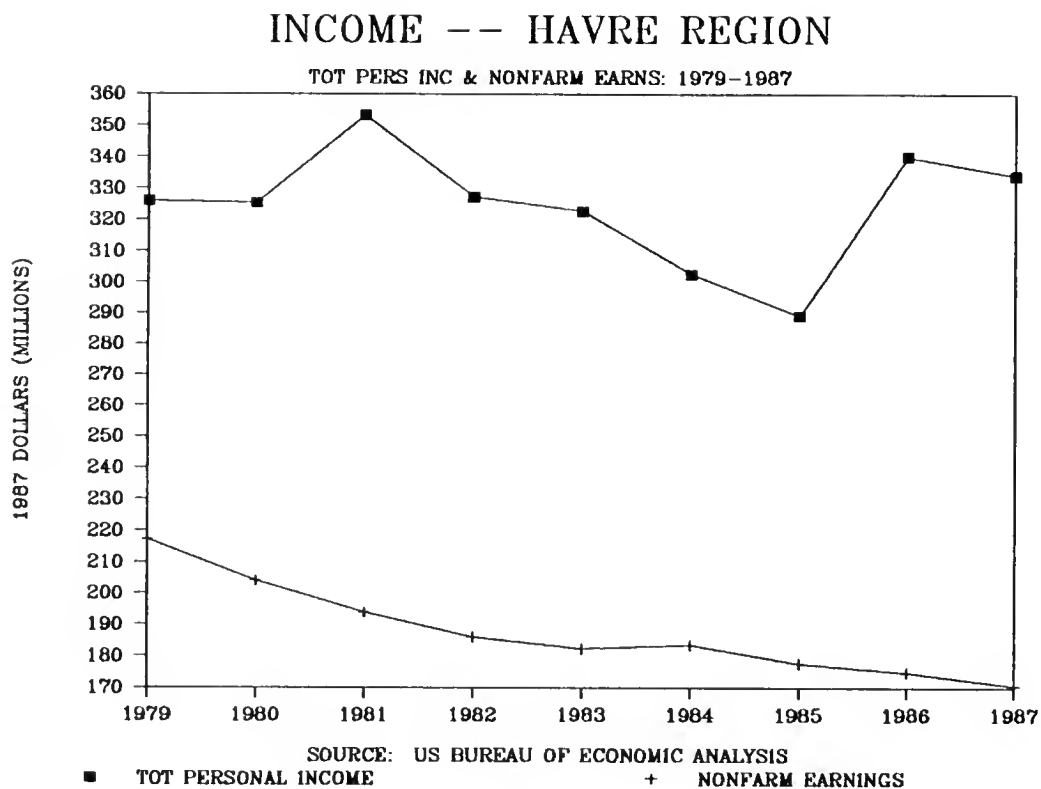


Figure 2.41



The Helena Region

The Helena Region of west central Montana includes Broadwater, Jefferson, and Lewis and Clark counties.

Labor Force

In 1986, the Helena Region ranked sixth in the state with more than 33,000 total jobs. A rank of fifth for wage/salary jobs (Table 2.32) reflects a concentration of government jobs and fewer agricultural jobs in Lewis and Clark County. The region's share of total jobs (including self-employed) increased significantly from 6.7 percent in 1969 to 8.1 percent by 1986.

Job growth between 1969 and 1986 was exceptionally strong in the region, with total jobs increasing by 71 percent, an increase second only to that of the Bozeman Region. Steady growth in the early 1970s was eclipsed by strong growth at the end of the decade. Growth slowed in the early 1980s, however, as the state and the nation experienced a recession. The region's only year of job decline occurred in 1982. Steady growth returned in 1983, and continued through 1987 (Figure 2.44 and Table 2.32).

The widening gap between wage/salary jobs and total jobs shown in Figure 2.42 reflects the outstanding growth of self-employment in the Helena Region, particularly in recent years. Between 1979 and 1986, wage/salary jobs grew by 6 percent, the second highest percentage growth in the state. The self-employed increase during this same period was 55 percent, the largest increase in the state. As a result, total jobs between 1979 and 1986 grew by 15 percent (Table 2.5). The share of the region's jobs held by the self-employed also increased dramatically. In 1969, self-employment accounted for only 14 percent of total jobs in the region. By 1986, however, this figure had grown to 23 percent, but it was still below the Montana average of 26 percent because of the small agricultural sector in the region.

The majority of jobs in the Helena Region were concentrated in three sectors: government, services, and retail trade. Transportation/public utilities, manufacturing, agriculture, construction, wholesale trade, and mining all held a smaller share of jobs regionally than the statewide average, and each of these sectors (except mining) declined as a percentage of wage/salary jobs between 1969 and 1986. The shares of services and retail trade increased markedly, following a statewide trend. Government remained an important employer in the region because of the location of the state capital and the federal offices in Helena, but government jobs decreased as a share of total jobs from 32 percent in 1969 to 26 percent in 1986. This share, however, was still significantly greater than the 1986 Montana average of 18 percent.

Between 1969 and 1979, nearly every sector of the Helena Region enjoyed strong growth in wage/salary jobs. Even agricultural jobs (including the self-employed) increased. The only declining sector was mining, with a small loss occurring in the metal mining industry. Strongest job growth during this period was in state/local government, eating/drinking places, communications, lumber/wood products, hotels/motels, and banking/other credit services.

The period of 1979–1986 was one of slower growth in the region. Several factors were responsible for this slowdown. A decline in the communications industry after 1981, primarily because of Mountain Bell reorganization, meant the loss of about 500 jobs, which offset the growth that occurred during the 1970s. Smaller declines also took place in lumber/wood products, hotels/motels, finance/insurance/real estate, and construction (primarily in special trade contractors). Growth in other sectors, however, more than offset these declines. State/local government, eating/drinking places, private business/health/social services, food stores, and metal mining all posted significant increases in wage/salary jobs between 1979–1986.

Table 2.33 shows changes in wage/salary employment between 1986 and 1987. Relatively large declines in communications, manufacturing (including wood products), and heavy construction contractors occurred. But strong gains in private health services, metal mining, eating/drinking places, and private business services more than offset these declines, with wage/salary jobs growing by 2.6 percent or nearly 600 jobs.

A favorable unemployment rate in Lewis and Clark County, coupled with the exceptionally low rate in Jefferson County, placed the Helena Region at the top of the state in 1987 with its relatively low unemployment rate of 6.3 percent. Figure 2.44 illustrates the region's above-average performance between 1970 and 1987, as well as the tendency for the regional unemployment rate and the statewide average to move in tandem.

Population

In 1987, the population of nearly 59,000 for the Helena Region ranked seventh in the state, somewhat lower than the sixth place rank of total jobs and the fifth place performance of wage/salary jobs. Lewis and Clark County accounted for over 75 percent of the total population and ranked sixth out of the 56 counties.

Historically, population growth in the Helena Region has been strong, with the exception of the 1910–1930 period. Growth continued in recent years (Figure 2.43), with population increasing by 45 percent between 1969 and 1987, thus producing the greatest change in the state, and outdistancing the Montana average of 17 percent.

Income

Total personal income ranked sixth in the Helena Region in 1986, which is consistent with the total jobs figure. Nonfarm worker earnings ranked slightly higher at fifth, reflecting a similar rank for wage/salary jobs, while farm earnings for this region ranked last in the state. By far the largest part of the non-agricultural income components were associated with Lewis and Clark County, although farm earnings were shared much more evenly (Table 2.32).

Steady, moderate growth of total personal income for this region results from contributions from each component during different years (Figure 2.45).

Between 1979 and 1982, when both nonfarm earnings and farm earnings declined, total personal income grew because of solid growth in property income and transfer payments. Between 1982 and 1985, farm earnings were very low and not growing, property income stagnated, but transfer payments grew. Solid growth in nonfarm earnings through 1985, however, translated into growth in total personal income. In 1986, nonfarm earnings declined some, but agricultural recovery produced growth in both farm earnings and total personal income. In 1987, when farm earnings remained unchanged over the previous year, nonfarm earnings contributed to the growth of total income. As a result of all components' contributions, total personal income grew by 9 percent between 1979 and 1986, the third highest growth in the state, while statewide income grew by only 3 percent (Table 2.10).

The Helena Region ranked second in the state in per capita income for the 1982-1986 period, slightly behind the Billings Region. Lewis and Clark County ranked third among Montana's counties, Jefferson County ranked ninth, and Broadwater County, hampered by several years of very low farm earnings, ranked 51st. Only Broadwater County remained consistently below Montana's per capita income between 1979 and 1986 (Table 2.32). Throughout this period, per capita income for the region hovered slightly above \$13,000.

Figure 2.42

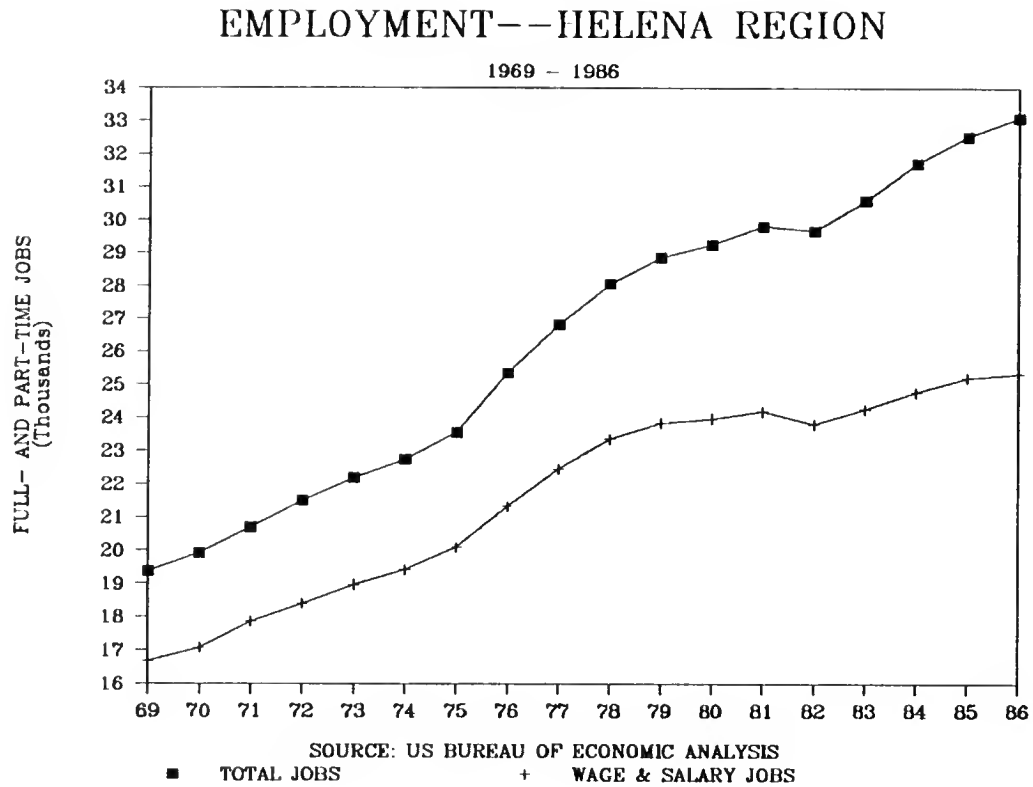


Figure 2.43

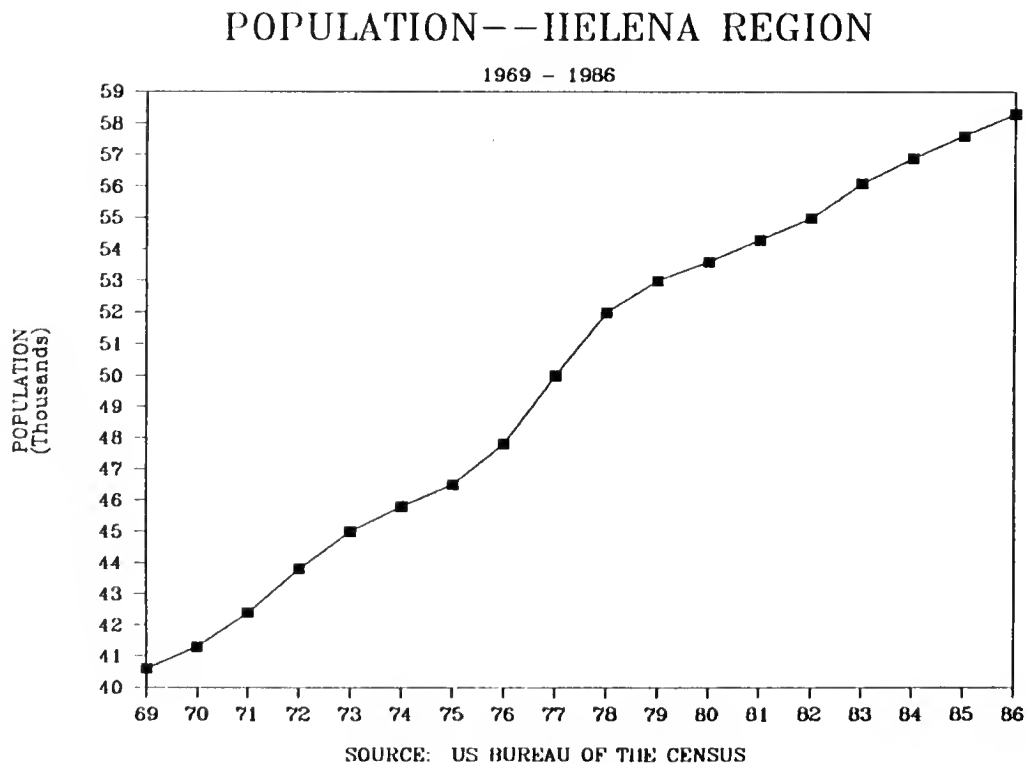


Table 2.32

	The Helena Region										Rank in State /d (Region or County)	
	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986	1987 /p	
Population /a												
Region	34,900	40,600	53,000	53,600	34,300	55,000	56,100	56,900	57,600	58,300	58,800	7
Broadwater	2,800	2,600	3,300	3,300	3,200	3,300	3,400	3,400	3,500	3,600	3,700	40
Jefferson	4,300	5,200	7,200	7,100	7,200	7,300	7,700	8,000	8,000	8,100	8,300	26
Lewis & Clark	27,800	32,800	42,500	43,200	43,900	44,400	45,000	45,500	46,100	46,600	46,800	6
Total Jobs /b												
Region	...	19,380	28,863	29,248	29,815	29,670	30,602	31,723	32,530	33,099	...	6
Broadwater	...	1,038	1,646	1,461	1,474	1,454	1,521	1,591	1,584	1,566	...	40
Jefferson	...	1,852	2,145	2,237	2,356	2,605	2,800	2,919	5,009	5,041	...	29
Lewis & Clark	...	16,490	25,072	25,550	25,985	25,611	26,281	27,213	27,937	28,512	...	4
Wage & Salary Jobs /b												
Region	...	16,677	23,842	23,959	24,187	23,795	24,248	24,762	25,189	25,324	...	5
Broadwater	...	647	1,135	962	961	924	959	996	972	911	...	40
Jefferson	...	1,443	1,405	1,446	1,482	1,679	1,791	1,851	1,899	1,881	...	30
Lewis & Clark	...	14,587	21,302	21,551	21,744	21,192	21,498	21,915	22,318	22,532	...	4
Unemployment Rate /c												
Region	...	3.5%	4.9%	5.2%	6.0%	7.6%	7.8%	6.5%	6.7%	6.8%	6.3%	1
Broadwater	...	2.9%	3.9%	7.1%	7.1%	9.9%	9.7%	7.9%	8.6%	11.9%	9.6%	47
Jefferson	...	4.4%	7.4%	6.5%	7.5%	10.4%	11.2%	8.1%	6.0%	6.0%	4.7%	8
Lewis & Clark	...	3.4%	4.8%	5.0%	5.8%	7.2%	7.2%	6.5%	6.7%	6.7%	6.5%	21
Total Personal Income (\$1000s) /b												
Region	285,242	418,515	706,262	709,296	716,726	722,491	732,126	743,740	760,712	769,973	785,000	6
Broadwater	17,459	19,650	37,477	34,267	32,601	30,794	32,263	32,043	31,243	38,299	...	42
Jefferson	25,913	40,059	85,922	87,202	88,412	90,016	95,059	98,166	100,640	105,368	...	23
Lewis & Clark	241,871	358,806	582,862	587,827	595,713	601,681	604,804	613,531	628,828	626,307	...	5
Per Capita Personal Income /b												
Region	8,173	10,329	13,324	13,243	13,191	13,136	13,059	13,084	13,207	13,223	13,400	2
Broadwater	6,235	7,700	11,458	10,531	10,200	9,332	9,487	9,372	8,889	10,728	...	51
Jefferson	6,026	7,768	11,872	12,327	12,217	12,349	12,339	12,326	12,545	13,033	...	9
Lewis & Clark	8,700	10,936	13,715	13,598	13,569	13,548	13,453	13,495	13,651	13,448	...	3
Nonfarm Earnings (\$1000s) /b												
Region	206,102	315,672	517,132	510,689	508,387	508,241	519,826	527,995	543,181	532,604	548,000	5
Broadwater	7,129	9,231	21,073	16,480	15,305	14,584	15,708	15,634	15,130	14,732	...	40
Jefferson	15,054	24,384	27,630	27,370	27,416	35,556	36,317	39,899	42,225	41,000	...	26
Lewis & Clark	183,919	282,058	468,429	466,838	465,666	458,101	467,801	472,462	485,825	478,872	...	4
Farm Earnings (\$1000s) /b												
Region	18,602	17,797	13,180	13,544	7,637	2,643	2,967	2,955	786	11,992	11,000	12
Broadwater	6,589	4,273	3,266	3,726	1,897	0	859	91	(1,820)	5,401	...	33
Jefferson	3,123	2,813	4,624	3,938	2,371	517	273	476	50	2,537	...	51
Lewis & Clark	8,890	10,711	5,290	5,880	3,369	2,126	1,836	2,388	2,556	4,053	...	42
Property Income (\$1000s) /b												
Region	42,343	54,326	96,913	100,443	113,768	122,787	118,396	124,280	124,900	125,259	125,000	7
Broadwater	2,305	3,396	7,457	7,474	8,124	8,406	7,988	8,201	9,085	9,052	...	44
Jefferson	2,704	3,885	11,051	11,212	12,395	13,122	14,315	16,141	18,776	16,807	...	31
Lewis & Clark	37,334	47,066	78,404	81,758	93,249	101,260	96,092	99,938	99,039	99,399	...	8
Transfer Payments (\$1000s) /b												
Region	24,596	46,413	100,571	106,707	113,003	119,740	124,257	126,052	133,266	138,024	139,000	8
Broadwater	1,543	2,527	4,728	5,293	6,076	6,673	6,734	6,969	7,604	7,977	...	39
Jefferson	2,864	5,412	11,903	12,661	13,865	14,681	14,958	15,450	15,817	16,394	...	27
Lewis & Clark	20,189	38,473	83,940	88,753	93,062	98,387	102,566	103,633	109,846	113,653	...	5

/a U.S. Bureau of the Census

/b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average)

/p 1987 data consists of preliminary estimates.

Table 2.33

WAGE & SALARY EMPLOYMENT IN THE HELENA REGION*: 1986-1987

INDUSTRY	SIC** CODE	1986	1987	CHANGE	PERCENT CHANGE
Total Wage and Salary Employment		22,803	23,394	591	2.6%
Total Private		14,541	15,108	567	3.9%
Agriculture, Forestry, Fishing, Hunting, & Trapping		E 211	E 227	E 16	E 7.6%
Agricultural Production--Crops ***	01	66	78	12	18.2%
Agricultural Production--Livestock ***	02	95	98	3	3.2%
Agricultural Services	07	50	51	1	2.0%
Forestry	08	"0"	"0"	"0"	"0"
Fishing, Hunting, and Trapping	09				
Mining		333	"0"	"0"	"0"
Metal Mining	10	307	444	137	44.6%
Coal Mining	12				
Oil and Gas Extraction	13	1	"0"	"0"	"0"
Mining of Non-Metallic Minerals, Except Fuels	14	24	27	3	12.5%
Construction		636	525	(111)	-17.5%
General Building Contractors	15	231	196	(35)	-15.2%
Heavy Construction Contractors	16	175	80	(95)	-54.3%
Special Trade Contractors	17	226	248	22	9.7%
Manufacturing		1,187	1,074	(113)	-9.5%
Food and Kindred Products	20	136	132	(4)	-2.9%
Textile Mill Products	22				
Apparel and Other Textile Products	23	"0"	"0"	"0"	"0"
Lumber and Wood Products	24	237	186	(51)	-21.5%
Furniture and Fixtures	25				
Paper and Allied Products	26				
Printing and Publishing	27	180	178	(2)	-1.1%
Chemicals and Allied Products	28	135	121	(14)	-10.4%
Petroleum Refining and Related Industries	29				
Rubber and Miscellaneous Plastic Products	30	"0"	"0"	"0"	"0"
Leather and Leather Products	31				
Stone, Clay, Glass, and Concrete Products	32	131	116	(15)	-11.5%
Primary Metals Processing	33	"0"	"0"	"0"	"0"
Fabricated Metal Products	34	14	5	(9)	-64.3%
Machinery, Except Electrical	35	"0"	"0"	"0"	"0"
Electrical and Electronic Equipment	36	"0"	"0"	"0"	"0"
Transportation Equipment	37	"0"	"0"	"0"	"0"
Instruments and Related Products	38				
Miscellaneous Manufacturing Industries	39	9	13	4	44.4%
Transportation and Public Utilities		1,356	1,189	(167)	-12.3%
Local and Interurban Passenger Transit	41	76	65	(11)	-14.5%
Trucking and Warehousing	42	137	182	45	32.8%
Water Transportation	44	7	6	(1)	-14.3%
Transportation by Air	45	22	53	31	140.9%
Pipelines, Except Natural Gas	46				
Transportation Services	47	19	22	3	15.8%
Communications	48	927	698	(229)	-24.7%
Electric, Gas, and Sanitary Services	49	163	159	(4)	-2.5%
Wholesale Trade		640	661	21	3.3%
Durable Goods	50	380	378	(2)	-0.5%
Nondurable Goods	51	258	281	23	8.9%
Retail Trade		4,175	4,322	147	3.5%
Building Materials and Hardware	52	176	166	(10)	-5.7%
General Merchandise Stores	53	324	341	17	5.2%
Food Stores	54	640	651	11	1.7%
Automotive Dealers and Service Stations	55	479	438	(41)	-8.6%
Apparel and Accessory Stores	56	122	121	(1)	-0.8%
Furniture and Home Furnishings Stores	57	143	167	24	16.8%
Eating and Drinking Places	58	1,843	1,975	132	7.2%
Miscellaneous Retail	59	440	456	16	3.6%
Finance, Insurance, and Real Estate		E 1,198	E 1,219	E 21	E 1.8%
Banking	60	365	354	(11)	-3.0%
Credit Agencies other than Banks	61	161	161	0	0.0%
Security, Commodity Brokers, and Services	62	30	42	12	40.0%
Insurance Carriers	63	360	394	34	9.4%
Insurance Agents, Brokers, and Services	64	124	99	(25)	-20.2%
Real Estate	65	154	164	10	6.5%
Combined Real Estate, Insurance, Etc.	66	"0"	"0"	"0"	"0"
Holding and Other Investment Offices	67	4	5	1	25.0%
Services		E 4,732	E 5,332	E 600	E 12.7%
Hotels and Other Lodging Places	70	354	411	57	16.1%
Personal Services	72	193	220	27	14.0%
Business Services	73	594	715	121	20.4%
Auto Repair, Services, and Garages	75	101	94	(7)	-6.9%
Miscellaneous Repair Services	76	47	51	4	8.5%
Motion Pictures	78	"0"	"0"	"0"	"0"
Amusement and Recreation Services	79	178	189	11	6.2%
Private Health Services	80	1,427	1,693	266	18.6%
Legal Services	81	156	161	5	3.2%
Private Educational Services	82	202	213	11	5.4%
Private Social Services	83	578	618	40	6.9%
Museums, Art Galleries, Etc.	84				
Membership Organizations Including Tribal Gov't	86	516	545	29	5.6%
Private Households	88	5	7	2	40.0%
Engineering, Accounting, and Other Services	89	381	415	34	8.9%
Non-Classifiable	99				
Government		8,261	8,284	23	0.3%
State		4,580	4,598	18	0.4%
Local		2,273	2,253	(20)	-0.9%
Federal		1,405	1,430	25	1.8%

*Includes only employment covered by the Unemployment Insurance Program.

**Standard Industrial Classification

***These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.44

UNEMPLOYMENT RATE -- HELENA REGION

1970 - 1987

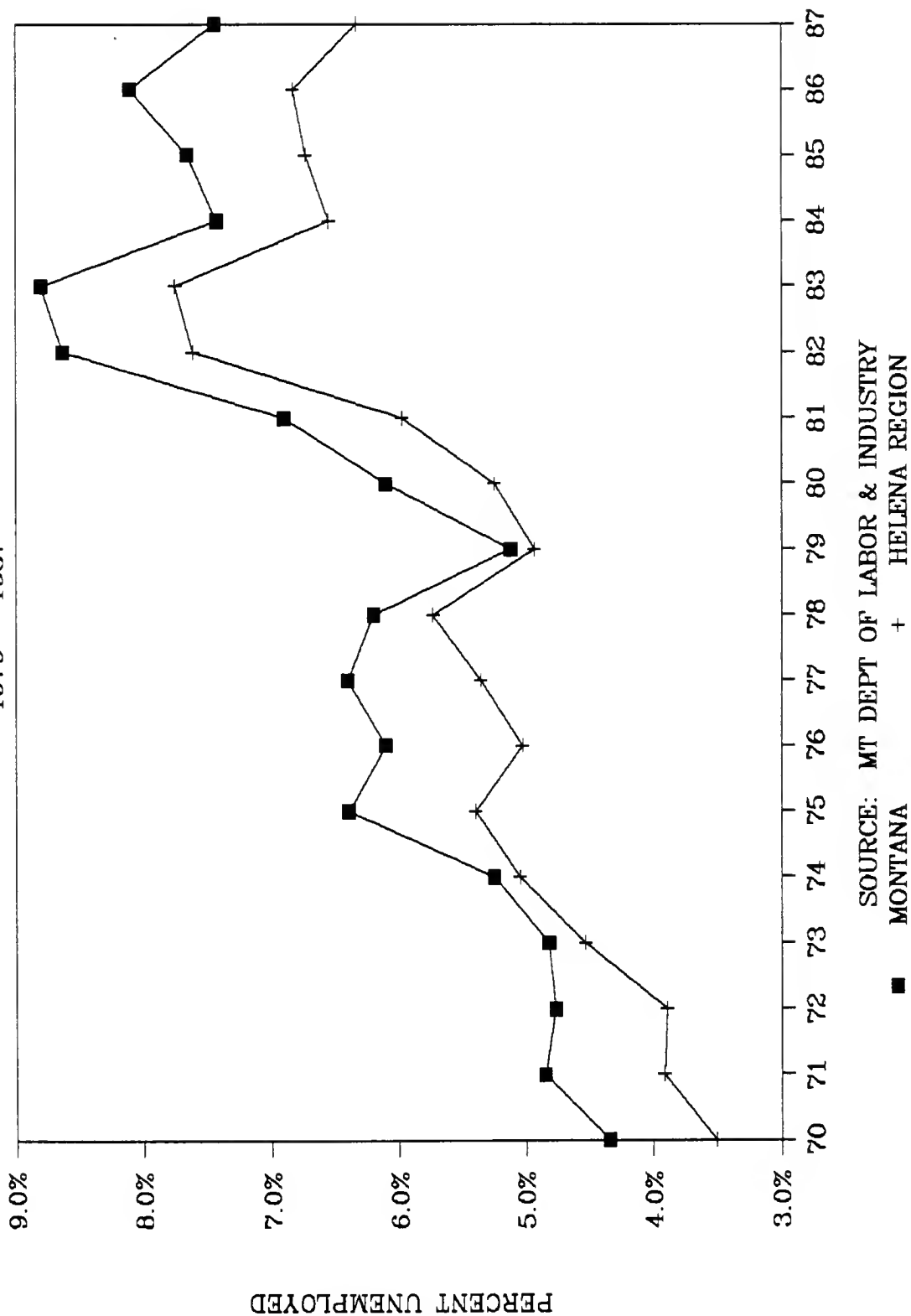
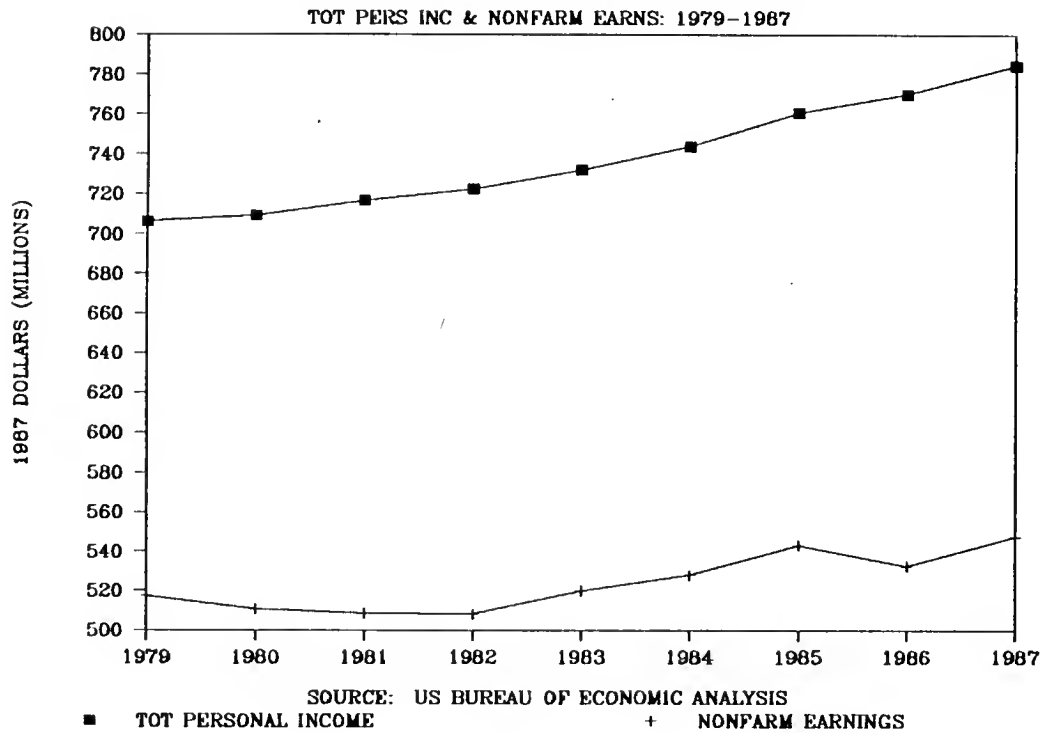
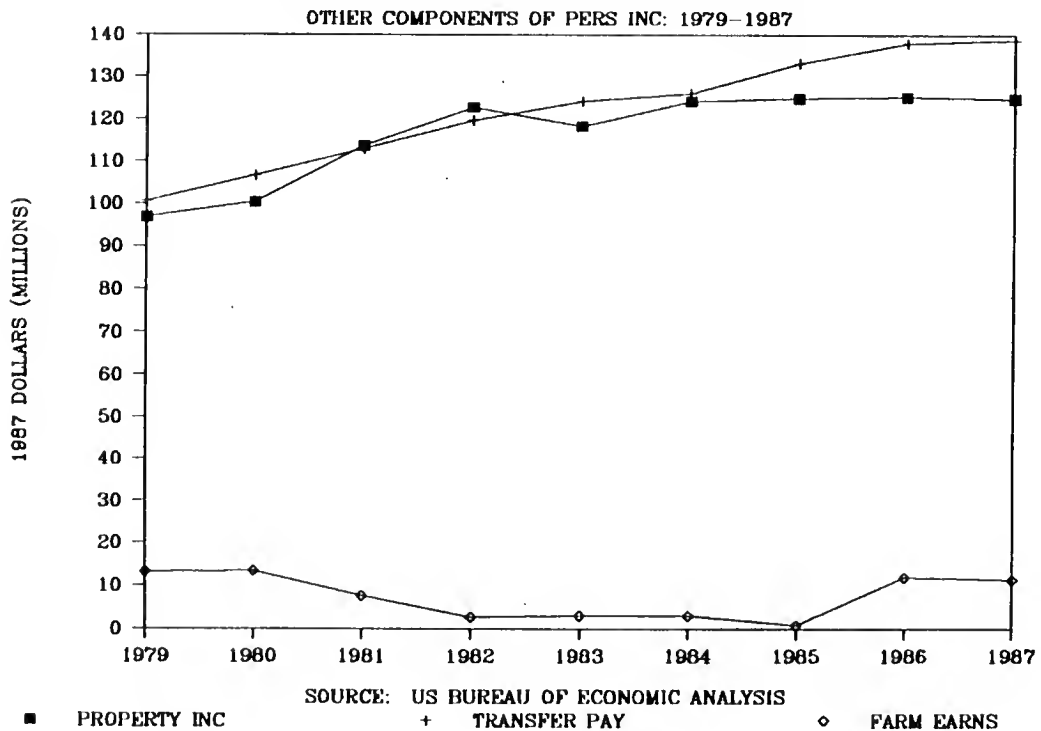


Figure 2.45

INCOME -- HELENA REGION



INCOME -- HELENA REGION



The Kalispell Region

Located in northwestern Montana, the Kalispell Region includes Flathead, Lake, Lincoln, and Sanders counties.

Labor Force

With more than 47,000 total jobs in 1986, the Kalispell Region ranked fourth among Montana's 12 regions (Table 2.34). Although more than half of these jobs were located in Flathead County, which ranked fifth in total jobs among counties, each of the other three counties contributed a significant number of jobs to the state's total, as is evidenced by their high county ranks. Jobs in the region accounted for 11.6 percent of total jobs in the state in 1986, up from 10.2 percent in 1969 (Figure 2.3).

As Figure 2.46 indicates, job growth in the Kalispell Region experienced periods of strong growth followed by stagnation or decline, a pattern similar to statewide job growth trends (Figure 2.9). The 1970s saw relatively strong growth, with both total and wage/salary jobs peaking in 1979. The 1980s began with steady declines in jobs, as much of the state succumbed to the national recession, but growth returned in 1983. Between 1984 and 1986, wage/salary jobs remained relatively constant, while self-employed growth led to an overall increase in total jobs similar to the statewide jobs experience. In 1987, growth in wage/salary jobs returned (Table 2.35).

Nearly all of the region's jobs increase after 1979 resulted from an increase in self-employment. Between 1979 and 1986, wage/salary jobs grew by only 2 percent. A 38 percent growth in self-employed, however, meant a total jobs increase of 10 percent (Table 2.5). In 1986, self-employment comprised 29 percent of the region's jobs, compared with a statewide average of 26 percent. (This regional statistic was up from 20 percent in 1969.)

The industrial composition of the Kalispell Region differs from the state in that its manufacturing sector, particularly in Flathead and Lincoln counties, is much larger. In 1969, manufacturing (primarily wood products) accounted for 25 percent of the wage/salary jobs in the region. By 1986, this figure had fallen to 17 percent, largely because of an increase in private services, but the statewide average of 7 percent illustrates this sector's regional importance. Other key sectors in the Kalispell Region include services, retail trade, and government—all important industries statewide.

Nearly all sectors in the region grew in the 1970s. Total jobs grew by more than 13,000 between 1969 and 1979, spurred by growth in state/local government, eating/drinking places, agriculture, primary metals processing, communications, and throughout the services industry (principally health, lodging, membership organizations, and social services). The only major jobs decline occurred in the heavy construction industry, following the completion of the Libby Dam in Lincoln County in the early 1970s.

After 1979, declines in manufacturing, construction, railroad transportation, and federal-civilian employment hindered growth. Within the manufacturing

sector, lumber/wood products and primary metal industries combined for a loss of more than 1,000 wage/salary jobs between 1979 and 1986. Private health services, eating/drinking places, mining (the opening of the Asarco silver mine in Lincoln County in 1981), and private business services provided considerable increases during this period. Total wage/salary jobs increased during the 1979-1986 period, despite declining between 1979-1982 and 1985-1986 (Figure 2.46).

The 1986-1987 period saw growth in the region's wage/salary jobs (Table 2.35). Strong performance in retail trade, lumber/wood products, and private business services offset declines in construction, and the entire region grew by nearly 800 wage/salary jobs. In addition, quarterly measures rather than yearly averages (which tend to "average out" growth that occurred in 1987 with the declines of 1986) show a stronger recovery in 1987. Between the fourth quarter of 1986 and the fourth quarter of 1987, wage/salary jobs increased by 4 percent, or nearly 1,200 jobs.

The Kalispell Region historically has had one of the highest unemployment rates in the state. In 1987 its 8.8 percent rate ranked last among Montana's regions. Figure 2.48 shows clearly the high unemployment rates of past years, with the region's rate following the statewide average, though at a higher level. A large part of the explanation for the region's high unemployment rates rests with the year-to-year changes and within-year seasonality of the lumber/wood products industry.

Population

With a population of approximately 107,000 in 1987, the Kalispell Region was fourth largest in the state. Flathead County ranked fourth among the 56 counties, and the region's other counties all had relatively high ranks.

The region's population increased in every decade since first being counted in 1900, with particularly strong growth occurring after 1960 (Table 2.8). Between 1969 and 1986, population increased every year (Figure 2.47), and the growth of 37.5 percent during this period was one of the highest in the state. During this same period, a loose relationship between total jobs and population existed with population growth slowing whenever total jobs declined (e.g. 1979-1982). Estimates for 1987 suggest zero population growth.

Income

The Kalispell Region also ranked fourth in the state in total personal income and nonfarm earnings in 1986. Property income and transfer payments ranked third in the state, while farm earnings ranked 10th. Flathead, Lake, and Lincoln counties all had relatively high income rankings in 1986.

Figure 2.49 illustrates the relationship between total personal income and nonfarm earnings, with both measures moving together for most of the 1979-1987 period. Nonfarm earnings followed the wage/salary jobs pattern during this period, declining dramatically with the 1980-1982 recession. Recovery in 1983 and 1984 produced strong growth in total personal income, but growth

in 1985-1986 slowed as nonfarm earnings declined slightly. An increase in nonfarm worker earnings returned in 1987, associated with an increase in nonfarm wage/salary jobs described above.

Farm earnings basically followed the statewide trends between 1979 and 1987, declining sharply between 1980 and 1985. But because the agricultural sector is very small in this region, the substantial percentage decline in farm earnings between 1980 and 1985 was not critical to total personal income growth. Offsetting growth in property income and transfer payments during this period also helped obscure the decline. Because nonfarm earnings declined slightly in 1986, however, agriculture's recovery translated into personal income growth.

The Kalispell Region ranked 11th in per capita income for the 1982-1986 period. Although Flathead County ranked relatively high among counties at 14th, Lake, Lincoln, and Sanders counties all ranked quite low (Table 2.34). Consequently, regional per capita income was consistently below the state average between 1979 and 1987 (Table 2.16).

Figure 2.46

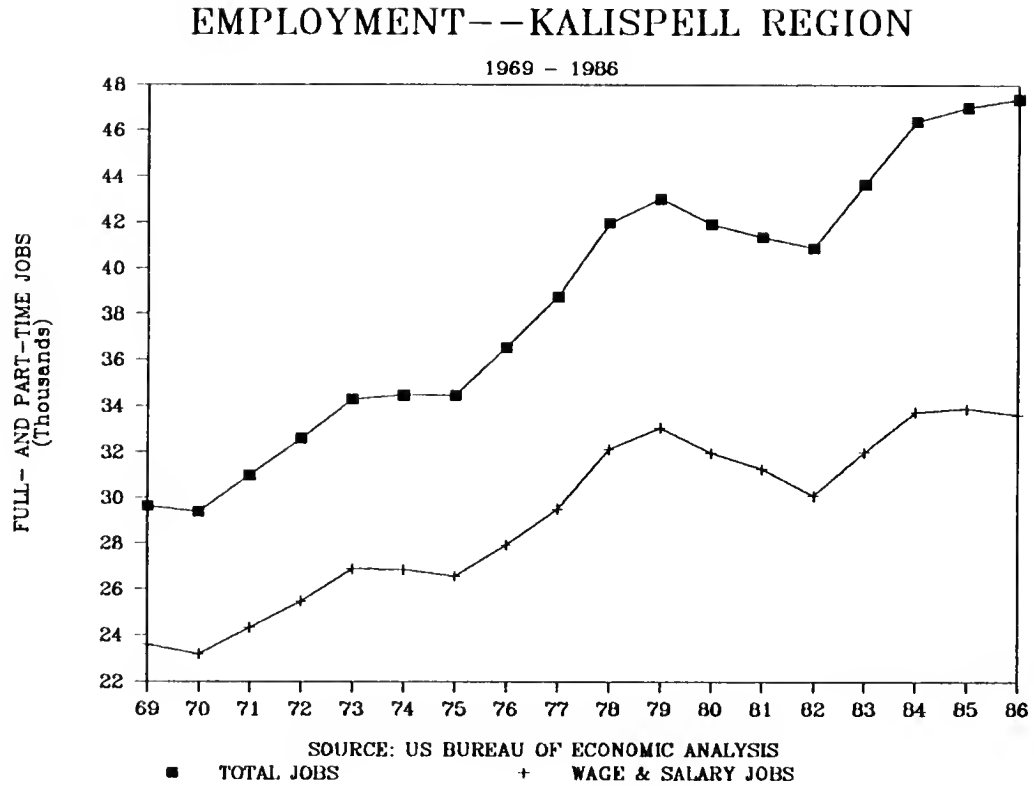


Figure 2.47

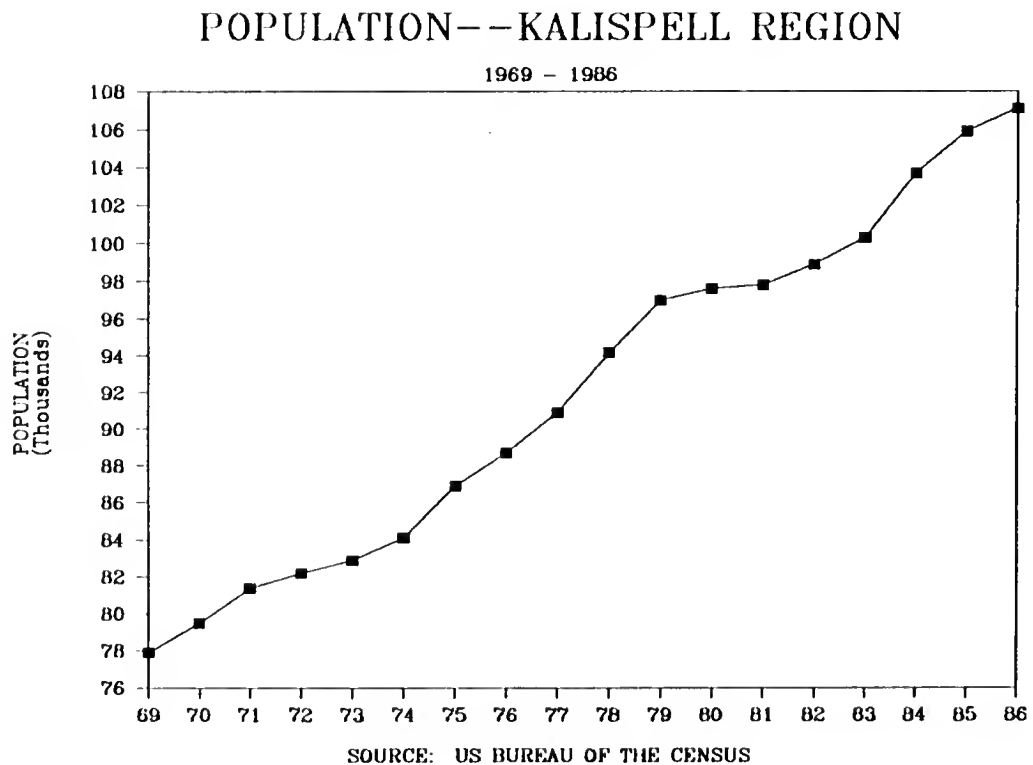


Table 2.34

The Kalispell Region												Rank in State /d	
	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986	1987 /p	(Region or County)	

Population /a													
Region	64,900	77,900	97,000	97,600	97,800	98,900	100,300	103,700	105,900	107,100	107,000	4	
Flathead	32,700	38,900	51,500	52,000	52,100	52,400	53,300	55,500	57,300	58,300	58,200		4
Lake	13,000	14,300	18,600	19,100	19,200	19,400	19,700	20,300	20,700	20,900	21,000		9
Lincoln	12,400	17,600	17,900	17,800	17,800	18,100	18,300	18,700	18,800	19,000	19,000		10
Sanders	6,800	7,100	9,000	8,700	8,700	9,000	9,000	9,200	9,100	8,900	8,800		23
Total Jobs /b													
Region	...	29,641	43,029	41,930	41,351	40,892	43,658	46,386	47,012	47,379	...	4	
Flathead	...	14,976	24,852	24,308	23,716	23,396	25,101	27,401	28,127	28,074	...		5
Lake	...	4,639	6,881	6,767	6,928	7,079	7,387	7,666	8,105	8,243	...		10
Lincoln	...	7,411	7,399	6,948	7,024	6,852	7,397	7,393	7,357	7,590	...		11
Sanders	...	2,615	3,897	3,907	3,683	3,565	3,773	3,926	3,423	3,472	...		25
Wage & Salary Jobs /b													
Region	...	23,573	33,045	31,968	31,240	30,099	31,973	33,726	33,879	33,604	...	4	
Flathead	...	12,193	19,698	19,193	18,514	17,834	18,962	20,562	20,989	20,548	...		5
Lake	...	2,980	4,586	4,461	4,603	4,632	4,810	4,926	5,289	5,326	...		10
Lincoln	...	6,479	5,904	5,445	5,514	5,198	5,608	5,536	5,434	5,564	...		9
Sanders	...	1,921	2,857	2,869	2,609	2,435	2,593	2,702	2,167	2,166	...		25
Unemployment Rate /c													
Region	...	7.3%	7.2%	9.4%	10.7%	13.7%	10.8%	9.0%	9.5%	9.9%	8.8%	12	
Flathead	...	7.0%	8.6%	8.3%	10.1%	12.9%	10.5%	7.7%	8.5%	9.0%	8.1%		36
Lake	...	6.7%	6.0%	7.4%	7.9%	9.7%	8.3%	7.8%	8.2%	9.4%	7.8%		34
Lincoln	...	8.9%	10.4%	15.4%	15.0%	19.4%	13.4%	12.8%	11.8%	11.5%	10.8%		52
Sanders	...	6.0%	7.9%	9.7%	11.5%	16.0%	12.6%	12.4%	16.6%	15.5%	12.9%		55
Total Personal Income (\$1000s) /b													
Region	480,858	689,941	1,135,365	1,088,855	1,077,124	1,046,769	1,110,956	1,160,645	1,162,918	1,178,512	1,190,000	4	
Flathead	254,983	367,521	675,835	650,335	639,455	620,296	657,919	700,739	704,309	701,784	...		4
Lake	71,489	101,776	185,227	183,096	179,729	177,603	187,791	194,936	201,469	213,326	...		10
Lincoln	110,047	168,014	188,607	170,721	177,385	170,117	183,796	179,781	178,496	182,462	...		11
Sanders	44,319	52,630	85,696	84,703	80,555	78,753	81,451	85,189	78,644	80,940	...		29
Per Capita Personal Income /b													
Region	7,409	8,851	11,705	11,159	11,002	10,590	11,067	11,192	10,983	11,009	11,100	11	
Flathead	7,798	9,441	13,121	12,501	12,262	11,841	12,338	12,638	12,298	12,036	...		14
Lake	5,499	7,094	9,966	9,592	9,367	9,162	9,516	9,594	9,728	10,216	...		49
Lincoln	8,875	9,554	10,520	9,606	9,953	9,421	10,042	9,609	9,504	9,612	...		50
Sanders	6,517	7,424	9,545	9,745	9,216	8,729	9,025	9,236	8,620	9,119	...		54
Nonfarm Earnings (\$1000s) /b													
Region	347,719	530,822	789,440	716,627	690,504	640,635	696,257	736,441	729,944	724,697	737,000	4	
Flathead	182,225	276,482	492,867	451,420	428,256	395,914	425,597	465,965	464,501	455,227	...		5
Lake	37,567	54,856	90,443	82,967	82,576	80,529	86,971	89,586	96,479	97,587	...		12
Lincoln	97,398	164,280	150,871	128,777	134,053	120,966	136,789	131,164	127,817	130,631	...		9
Sanders	30,530	35,203	55,259	53,463	47,618	43,226	46,900	49,726	41,147	41,251	...		25
Farm Earnings (\$1000s) /b													
Region	28,551	24,075	24,623	29,086	14,555	7,152	4,656	7,394	7,728	22,989	22,000	10	
Flathead	11,151	9,108	5,821	9,432	5,909	4,764	4,897	5,502	7,141	10,472	...		15
Lake	11,902	10,289	12,170	13,725	4,354	(955)	(2,796)	(1,249)	(2,189)	7,517	...		26
Lincoln	1,891	1,323	1,415	1,149	777	773	522	787	685	1,230	...		54
Sanders	3,607	3,355	5,217	4,780	3,514	2,569	2,033	2,355	2,090	3,771	...		44
Property Income (\$1000s) /b													
Region	63,920	84,256	182,719	189,068	210,559	218,485	225,239	232,625	233,912	234,115	233,000	3	
Flathead	37,437	47,086	108,855	112,705	125,675	128,773	133,537	139,161	139,241	139,285	...		4
Lake	13,286	18,234	41,405	43,292	48,466	51,319	54,107	55,460	55,073	54,945	...		9
Lincoln	7,225	11,743	18,996	18,902	20,528	21,992	21,822	21,854	22,559	22,809	...		22
Sanders	5,971	7,193	13,463	14,169	15,890	16,401	15,773	16,151	17,038	17,077	...		30
Transfer Payments (\$1000s) /b													
Region	52,081	76,871	171,215	184,376	193,667	212,732	218,166	221,812	231,966	238,581	240,000	3	
Flathead	29,002	40,747	90,760	97,245	102,075	111,215	115,203	115,421	120,501	123,938	...		4
Lake	9,434	16,243	35,974	38,320	40,995	44,111	46,008	48,023	50,416	52,058	...		9
Lincoln	7,658	11,670	27,580	31,084	31,863	35,971	35,034	35,988	37,592	38,564	...		11
Sanders	5,986	8,211	16,901	17,728	18,733	21,435	21,921	22,380	23,457	24,020	...		17

/a U.S. Bureau of the Census

/b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average)

/p 1987 data consists of preliminary estimates.

Table 2.35

WAGE & SALARY EMPLOYMENT IN THE KALISPELL REGION*: 1986-1987

INDUSTRY	SIC** CODE	1986	1987	CHANGE	PERCENT CHANGE
Total Wage and Salary Employment		29,979	30,759	780	2.6%
Total Private		23,641	24,351	710	3.0%
Agriculture, Forestry, Fishing, Hunting, & Trapping		E 461	E 505	E 44	E 9.5%
Agricultural Production--Crops ***	01	145	176	31	21.4%
Agricultural Production--Livestock ***	02	80	94	14	17.5%
Agricultural Services	07	102	107	5	4.9%
Forestry	08	134	128	(6)	-4.5%
Fishing, Hunting, and Trapping	09	"0"	"0"	"0"	"0"
Mining		574	561	(13)	-2.3%
Metal Mining	10	377	381	4	1.1%
Coal Mining	12				
Oil and Gas Extraction	13	12	8	(4)	-33.3%
Mining of Non-Metallic Minerals, Except Fuels	14	180	169	(11)	-6.1%
Construction		1,175	976	(199)	-16.9%
General Building Contractors	15	321	256	(65)	-20.2%
Heavy Construction Contractors	16	332	289	(43)	-13.0%
Special Trade Contractors	17	518	427	(91)	-17.6%
Manufacturing		5,615	5,883	268	4.8%
Food and Kindred Products	20	82	108	26	31.7%
Textile Mill Products	22				
Apparel and Other Textile Products	23	"0"	"0"	"0"	"0"
Lumber and Wood Products	24	3,937	4,148	211	5.4%
Furniture and Leather Products	25	"0"	"0"	"0"	"0"
Paper and Allied Products	26				
Printing and Publishing	27	212	215	3	1.4%
Chemicals and Allied Products	28	"0"	"0"	"0"	"0"
Petroleum Refining and Related Industries	29				
Rubber and Miscellaneous Plastic Products	30	"0"	"0"	"0"	"0"
Leather and Leather Products	31	6	10	4	66.7%
Stone, Clay, Glass, and Concrete Products	32	100	95	(5)	-5.0%
Primary Metals Processing	33	853	826	(27)	-3.2%
Fabricated Metal Products	34	63	132	69	109.5%
Machinery, Except Electrical	35	204	204	0	0.0%
Electrical and Electronic Equipment	36	50	64	14	28.0%
Transportation Equipment	37	55	35	(20)	-36.4%
Instruments and Related Products	38	"0"	"0"	"0"	"0"
Miscellaneous Manufacturing Industries	39	11	15	4	36.4%
Transportation and Public Utilities		1,405	1,339	(66)	-4.7%
Local and Interurban Passenger Transit	41	144	135	(9)	-6.3%
Trucking and Warehousing	42	447	445	(2)	-0.4%
Water Transportation	44	6	(6)	-100.0%	
Transportation by Air	45	54	61	7	13.0%
Pipelines, Except Natural Gas	46				
Transportation Services	47	73	78	5	6.8%
Communications	48	400	345	(55)	-13.8%
Electric, Gas, and Sanitary Services	49	274	263	(11)	-4.0%
Wholesale Trade		834	848	14	1.7%
Durable Goods	50	376	402	26	6.9%
Nondurable Goods	51	454	442	(12)	-2.6%
Retail Trade		5,959	6,253	294	4.9%
Building Materials and Hardware	52	380	414	34	8.9%
General Merchandise Stores	53	359	423	64	17.8%
Food Stores	54	921	977	56	6.1%
Automotive Dealers and Service Stations	55	835	853	18	2.2%
Apparel and Accessory Stores	56	236	267	31	13.1%
Furniture and Home Furnishings Stores	57	196	218	22	11.2%
Eating and Drinking Places	58	2,353	2,392	39	1.7%
Miscellaneous Retail	59	666	697	31	4.7%
Finance, Insurance, and Real Estate		E 1,152	E 1,178	E 26	E 2.3%
Banking	60	580	559	(21)	-3.6%
Credit Agencies other than Banks	61	122	138	16	13.1%
Security, Commodity Brokers, and Services	62	15	15	0	0.0%
Insurance Carriers	63	20	22	2	10.0%
Insurance Agents, Brokers, and Services	64	170	181	11	6.5%
Real Estate	65	232	253	21	9.1%
Combined Real Estate, Insurance, Etc.	66	"0"	"0"	"0"	"0"
Holding and Other Investment Offices	67	13	10	(3)	-23.1%
Services		E 6,402	E 6,732	E 330	E 5.2%
Hotels and Other Lodging Places	70	887	899	12	1.4%
Personal Services	72	330	320	(10)	-3.0%
Business Services	73	466	628	162	34.8%
Auto Repair, Services, and Garages	75	125	154	29	23.2%
Miscellaneous Repair Services	76	64	66	2	3.1%
Motion Pictures	78	71	78	7	9.9%
Amusement and Recreation Services	79	265	281	16	6.0%
Private Health Services	80	2,572	2,600	28	1.1%
Legal Services	81	155	188	33	21.3%
Private Educational Services	82	259	267	8	3.1%
Private Social Services	83	381	420	39	10.2%
Museums, Art Galleries, Etc.	84	"0"	"0"	"0"	"0"
Membership Organizations Including Tribal Gov't	86	600	611	11	1.8%
Private Households	88	48	48	0	0.0%
Engineering, Accounting, and Other Services	89	179	172	(7)	-3.9%
Non-Classifiable	99	1	1	0	0.0%
Government		6,338	6,404	66	1.0%
State		686	697	11	1.6%
Local		3,954	3,941	(13)	-0.3%
Federal		1,693	1,764	71	4.2%

*Includes only employment covered by the Unemployment Insurance Program.

**Standard Industrial Classification

***These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.48

UNEMPLOYMENT RATE -- KALISPELL REG

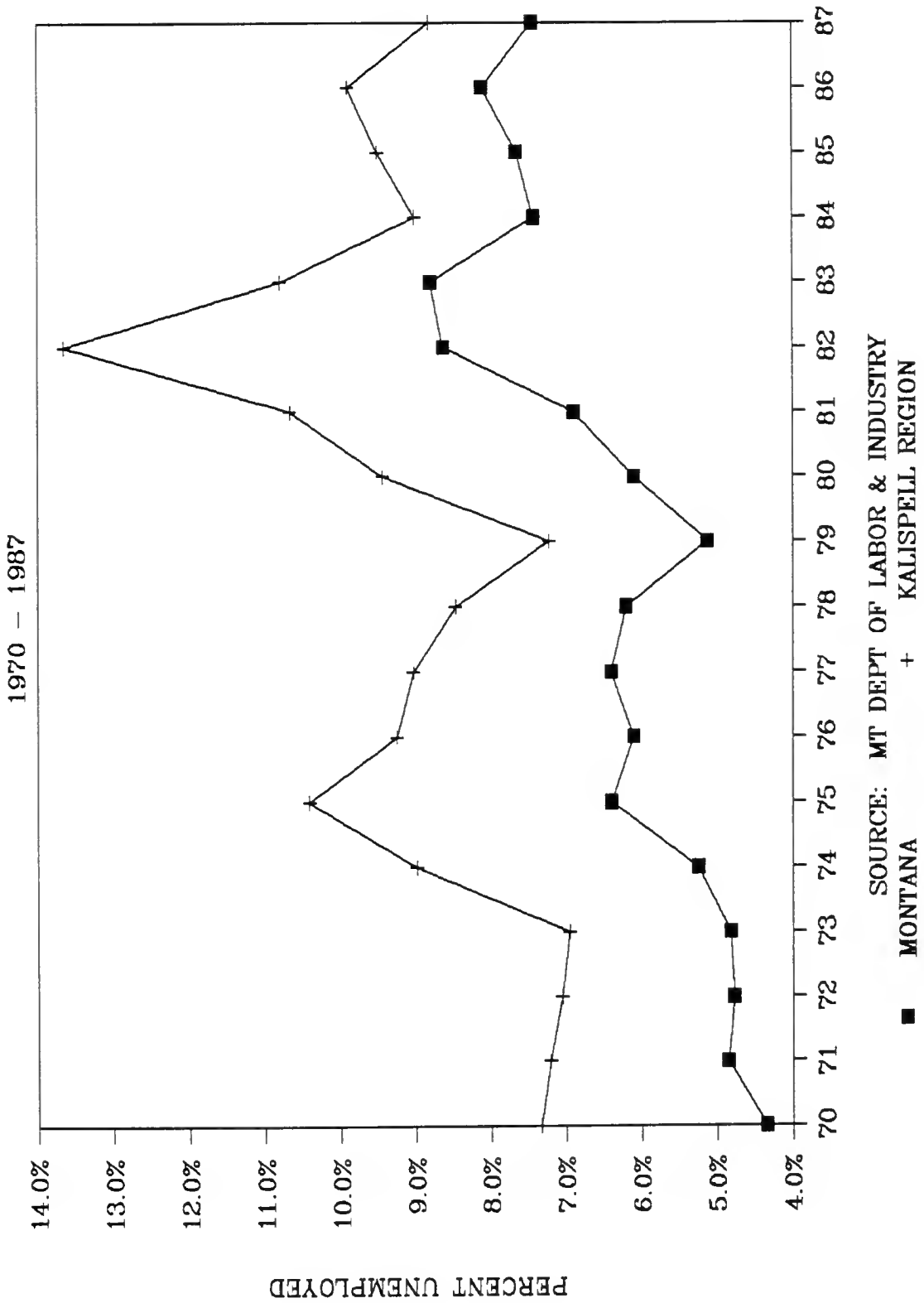
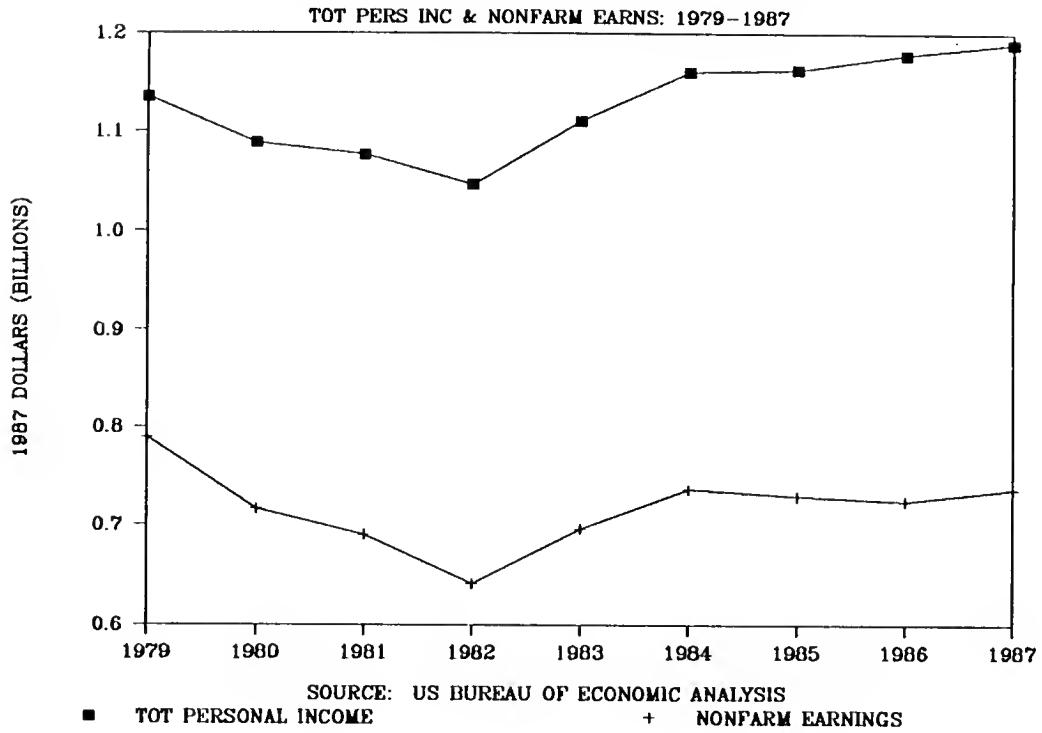
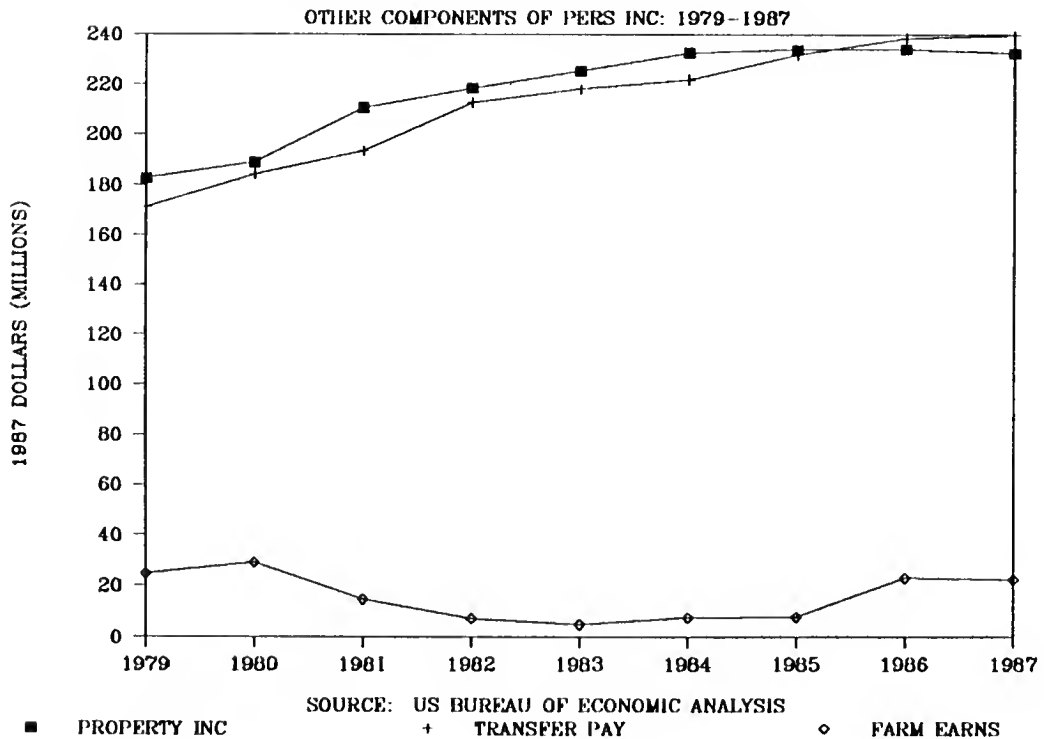


Figure 2.49

INCOME -- KALISPELL REGION



INCOME -- KALISPELL REGION



The Lewistown Region

The Lewistown Region is located in central Montana and includes Fergus, Golden Valley, Judith Basin, Musselshell, Petroleum, and Wheatland counties.

Labor Force

The Lewistown Region ranked last in the state in total jobs, in wage/salary jobs, and in population in 1986 (Table 2.36). In 1986, Fergus County accounted for more than half of the region's jobs and ranked 15th in the state for total jobs. The region's 11,000 total jobs accounted for 2.7 percent of the total number of statewide jobs, down from 3.5 percent in 1969 (Figure 2.3).

Job growth between 1969 and 1986 was relatively small, with the region's total jobs increasing by only 8 percent, which was the third smallest percentage growth in the state. Between 1969 and 1979, total jobs experienced moderate growth, with the only exception occurring during the 1975 statewide economic stagnation. Between 1979 and 1986, wage/salary jobs declined steadily, posting a loss of 11 percent. Because of a 16 percent self-employed growth during this same period, however, only a slight decline in total jobs occurred (Figure 2.50 and Table 2.5). By 1986 self-employment accounted for 42 percent of all regional jobs, compared with a statewide average of 26 percent. In 1987, wage/salary jobs remained basically unchanged.

The importance of the self-employed to the Lewistown Region reflects in part the large share of jobs in the region devoted to agriculture. In 1969, agriculture accounted for 31 percent of all jobs in the region, and, falling to 24 percent by 1986, this share was still remarkably larger than the statewide average of 9 percent. Other key sectors in the region--government, services, and retail trade--reflect importance statewide.

Growth in wage/salary jobs during the 1970s was led by strong performance in private health services, eating/drinking places, government (excluding military), construction, lumber/wood products, food stores, and oil/gas extraction. Notable declines included agriculture, the military, and railroad transportation.

Between 1979 and 1986, declines in every major sector of the economy occurred, with retail trade, oil/gas extraction, construction, and federal agencies experiencing the largest job losses. Sectoral wage/salary job growth during this period was virtually nonexistent, although by 1984 several sectors, such as government and construction, had begun to grow slightly. Between 1986 and 1987, more job growth occurred, with health and other professional services and mining posting gains. Declines in manufacturing (closure of the gypsum processing facility near Lewistown) and construction, however, more than offset these gains, and total wage/salary jobs declined yearly between 1986-1987 (Table 2.37). Comparing the fourth quarters of 1986 and 1987 instead of yearly averages provides a slightly different picture: wage/salary jobs actually increased by more than 75 jobs, indicating the start of an economic recovery fueled, in part, by increased metal mining activity.

In 1987, the region's high unemployment rate of 8.7 percent was the second highest rate in the state, with only Judith Basin County having an unemployment rate below the state average of 7.4 percent. Prior to 1986, however, the unemployment rate in the Lewistown Region was generally well below that of the state, (Figure 2.52).

Population

Early, quick growth characterized the Lewistown Region between 1890 and 1920, when population peaked at just under 46,000 (Table 2.8). Since that time, population has declined in every decade except the 1970s, producing the smallest regional population in 1987 at just over 23,000.

Figure 2.51 illustrates graphically the more recent changes in population between 1969 and 1986. Comparing this graph with Figure 2.50, the general relationship between jobs and population appears to hold. Growth in total jobs during the 1970s was followed by population growth after 1972. Total jobs remained fairly constant during the 1980s, as did population. The decline in population in 1986 and 1987 partially reflected the decrease in wage/salary jobs between 1981 and 1986 as well as the generally rising unemployment rate over the same period.

Income

Total personal income in the Lewistown Region ranked last in the state in 1986, consistent with population and jobs rankings. The income components generally also ranked very low, although farm earnings were relatively high at eighth, indicating the importance of agriculture.

Two major trends in income occurred between 1979 and 1987 in the Lewistown Region (Figure 2.53). First, total personal income experienced the second largest decline in the state (Table 2.10) because of steady decline in nonfarm earnings throughout the period and the net decline of farm earnings after a peak in 1979. Second, despite the steady performance of nonfarm earnings between 1979 and 1987, total personal income was very unstable because of the importance of the extremely volatile farm earnings component. A comparison of farm earnings changes reveals that they were mirrored by changes in total personal income. Farm earnings changes were very similar to those at the state level, with a dramatic decline occurring between 1981 and 1985. This decline produced negative farm earnings in 1985. A strong recovery occurred in 1986, however, translating into a temporary rise in total income. Throughout this entire period, property income and transfer payments followed statewide trends and increased slightly (Tables 2.9 and 2.36).

The Lewistown Region ranked 10th in per capita income for the 1982-1986 period, reflecting four-out-of-five bad farm years. A careful look at per capita income for this region reveals that the changes closely followed farm earnings changes for the entire 1979-1987 period--another statement about the importance of agriculture to the region's economic performance (Table 2.36).

Figure 2.50



Figure 2.51

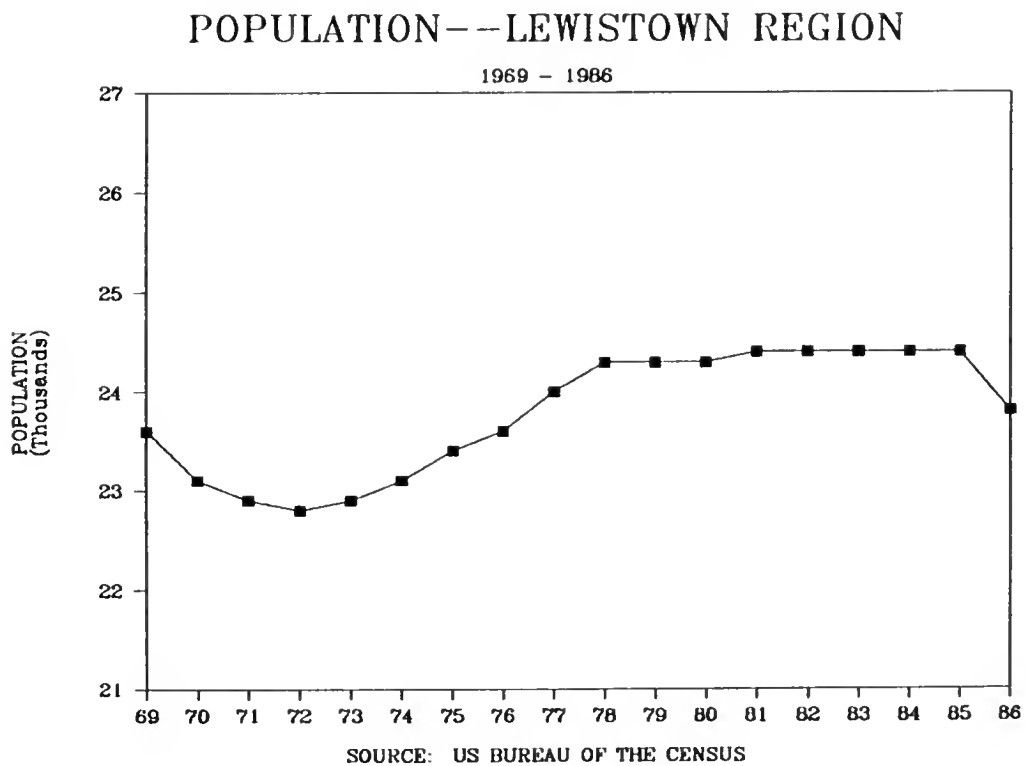


Table 2.36

The Lewistown Region												Rank in State /d (Region or County)
	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986	1987 /p	
Population /a												
Region	26,900	23,600	24,300	24,300	24,400	24,400	24,400	24,400	24,400	23,800	23,200	12
Fergus	13,900	12,800	13,000	13,100	13,000	13,000	12,800	12,800	12,900	12,600	12,300	16
Golden Valley	1,200	1,000	1,000	1,000	1,100	1,100	1,100	1,100	1,100	1,100	1,100	54
Judith Basin	3,100	2,700	2,700	2,700	2,800	2,700	2,700	2,700	2,700	2,600	2,500	45
Musselshell	4,800	3,800	4,600	4,500	4,600	4,600	4,800	4,800	4,800	4,700	4,500	37
Petroleum	900	700	700	700	700	700	700	700	700	600	600	56
Wheatland	3,000	2,600	2,300	2,300	2,200	2,300	2,300	2,300	2,200	2,200	2,200	48
Total Jobs /b												
Region	...	10,262	11,304	11,095	11,155	10,919	10,912	11,037	11,061	11,119	...	12
Fergus	...	5,471	6,340	6,183	6,105	5,665	5,957	6,028	6,058	6,063	...	15
Golden Valley	...	409	405	405	427	419	423	437	448	476	...	54
Judith Basin	...	1,252	1,231	1,191	1,187	1,248	1,250	1,266	1,250	1,280	...	45
Musselshell	...	1,524	1,913	1,944	2,109	2,047	1,950	1,931	1,956	1,895	...	37
Petroleum	...	378	318	292	281	270	278	275	273	279	...	56
Wheatland	...	1,228	1,097	1,080	1,054	1,070	1,054	1,100	1,096	1,126	...	48
Wage & Salary Jobs /b												
Region	...	6,377	7,251	7,129	7,230	6,801	6,658	6,612	6,535	6,433	...	12
Fergus	...	3,564	4,373	4,282	4,217	3,909	3,918	3,859	3,827	3,746	...	19
Golden Valley	...	163	174	173	194	180	177	193	203	226	...	55
Judith Basin	...	594	593	563	599	616	572	582	566	577	...	49
Musselshell	...	976	1,254	1,283	1,432	1,324	1,227	1,166	1,167	1,092	...	39
Petroleum	...	210	164	143	136	129	132	130	128	133	...	59
Wheatland	...	870	893	681	650	643	632	662	644	637	...	48
Unemployment Rate /c												
Region	...	3.7%	3.6%	4.4%	4.3%	7.6%	8.0%	8.9%	7.5%	8.4%	8.7%	11
Fergus	...	3.7%	3.4%	4.8%	5.2%	7.5%	7.3%	7.0%	8.1%	9.0%	8.8%	39
Golden Valley	...	5.4%	4.2%	4.3%	3.4%	8.0%	9.4%	7.7%	7.3%	7.0%	9.1%	43
Judith Basin	...	2.0%	8.1%	6.9%	2.8%	5.9%	7.8%	6.6%	6.7%	5.3%	5.3%	12
Musselshell	...	5.0%	2.6%	2.3%	2.9%	8.9%	9.8%	7.2%	7.4%	10.6%	10.1%	50
Petroleum	...	2.9%	1.5%	3.9%	2.9%	3.9%	8.8%	6.0%	6.1%	7.0%	6.5%	8
Wheatland	...	3.2%	2.3%	3.7%	4.3%	7.2%	7.6%	8.3%	5.7%	6.4%	10.9%	53
Total Personal Income (\$1000s) /b												
Region	179,180	233,311	297,700	288,570	297,398	269,444	265,321	260,586	251,307	283,118	271,000	12
Fergus	95,922	123,916	166,661	160,298	161,694	143,682	145,224	140,808	135,592	150,017	...	15
Golden Valley	7,673	9,015	10,949	10,830	12,038	11,147	10,156	11,236	11,114	14,341	...	54
Judith Basin	24,751	29,671	28,145	27,161	27,272	24,199	25,767	26,471	26,436	29,477	...	47
Musselshell	26,334	37,331	56,127	56,199	61,210	57,485	55,079	52,362	50,681	52,556	...	37
Petroleum	5,366	5,643	5,925	6,403	6,224	4,327	3,627	3,362	3,709	6,301	...	56
Wheatland	19,153	27,736	29,895	27,609	28,960	26,603	25,447	26,330	25,774	30,424	...	45
Per Capita Personal Income /b												
Region	8,661	9,916	12,263	11,918	12,263	11,089	10,866	10,687	10,334	11,955	11,700	10
Fergus	8,901	9,706	12,798	12,276	12,479	11,219	11,311	10,973	10,533	11,955	...	27
Golden Valley	6,394	9,400	10,949	10,443	11,128	10,350	9,456	10,150	9,671	13,097	...	38
Judith Basin	7,984	10,942	10,506	10,169	9,902	9,098	9,477	9,771	9,177	11,555	...	47
Musselshell	5,686	9,782	12,295	13,046	13,356	12,365	11,525	10,945	10,636	11,303	...	25
Petroleum	5,940	8,109	8,830	6,807	9,180	6,516	5,431	5,147	5,645	10,263	...	56
Wheatland	6,366	10,755	12,775	11,860	13,175	11,755	10,894	11,482	11,537	13,698	...	21
Nonfarm Earnings (\$1000s) /b												
Region	66,943	107,419	145,420	136,676	134,453	123,920	123,051	119,252	119,805	117,216	112,000	12
Fergus	50,453	61,231	89,674	84,627	80,036	73,109	74,853	71,249	71,953	70,749	...	20
Golden Valley	2,305	2,113	2,436	2,367	2,957	2,536	2,653	3,377	3,573	3,976	...	55
Judith Basin	6,545	7,374	9,862	8,845	8,695	8,853	8,379	8,500	8,444	8,592	...	49
Musselshell	14,943	20,475	29,459	30,009	30,687	27,680	25,550	23,764	23,182	21,363	...	38
Petroleum	2,179	2,259	1,623	1,453	1,656	1,409	1,520	1,626	1,686	1,707	...	56
Wheatland	10,518	15,967	12,566	11,377	10,624	10,334	10,116	10,736	10,966	10,831	...	47
Farm Earnings (\$1000s) /b												
Region	50,597	67,736	37,442	29,265	33,641	13,199	6,541	2,927	(5,949)	28,962	24,000	8
Fergus	22,864	30,277	19,326	14,704	15,716	5,325	1,846	(1,158)	(6,178)	8,830	...	20
Golden Valley	3,829	4,203	2,057	2,095	2,818	1,599	612	490	364	3,325	...	47
Judith Basin	13,241	15,360	5,049	4,307	3,754	1,156	1,841	1,755	(886)	4,510	...	39
Musselshell	3,652	7,103	1,985	2,378	3,270	1,366	495	402	(199)	3,943	...	43
Petroleum	2,560	2,950	2,708	1,223	2,696	1,024	76	(169)	188	2,732	...	50
Wheatland	4,451	7,843	6,317	4,559	5,386	2,731	1,869	1,586	761	5,623	...	30
Property Income (\$1000s) /b												
Region	27,337	36,418	68,219	70,240	77,539	79,556	82,194	84,210	83,791	83,387	61,000	10
Fergus	15,184	20,904	37,838	39,151	43,194	43,907	44,986	46,052	45,056	44,803	...	11
Golden Valley	1,043	1,623	3,561	3,346	5,431	3,682	3,824	4,170	3,988	3,961	...	54
Judith Basin	3,600	4,270	7,152	7,265	7,894	7,864	8,802	9,420	9,868	9,821	...	41
Musselshell	4,458	5,637	11,444	12,251	13,593	14,457	14,860	14,093	14,514	14,265	...	37
Petroleum	235	402	941	1,132	1,353	1,134	1,239	1,239	1,274	1,267	...	56
Wheatland	2,819	3,582	6,881	7,094	8,073	8,514	8,443	9,236	9,311	9,269	...	42
Transfer Payments (\$1000s) /b												
Region	17,975	27,080	48,005	51,029	52,690	53,787	54,514	54,966	55,626	56,880	57,000	12
Fergus	9,434	14,862	26,227	27,987	28,791	29,040	29,338	29,444	30,202	31,111	...	15
Golden Valley	718	1,061	1,397	1,707	1,803	1,929	2,050	2,163	2,191	2,232	...	56
Judith Basin	1,650	2,542	4,280	4,679	4,920	5,043	4,994	5,017	5,277	5,285	...	45
Musselshell	3,685	5,010	10,205	10,531	10,663	11,045	11,415	11,393	11,283	11,551	...	37
Petroleum	459	393	628	651	700	690	759	676	750	787	...	56
Wheatland	2,027	3,212	5,067	5,473	5,813	6,041	5,959	5,891	5,925	5,914	...	44

/a U.S. Bureau of the Census

/b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average)

/p 1987 data consists of preliminary estimates.

Table 2.37

WAGE & SALARY EMPLOYMENT IN THE LEWISTOWN REGION*: 1986-1987

INDUSTRY	SIC** CODE	1986	1987	CHANGE	PERCENT CHANGE
Total Wage and Salary Employment		5,094	5,001	(93)	-1.8%
Total Private		3,370	3,312	(58)	-1.7%
Agriculture, Forestry, Fishing, Hunting, & Trapping		E 69	E 78	E 9	E 13.0%
Agricultural Production--Crops ***	01	"0"	"0"	"0"	"0"
Agricultural Production--Livestock ***	02	51	55	4	7.8%
Agricultural Services	07	18	23	5	27.8%
Forestry	08				
Fishing, Hunting, and Trapping	09				
Mining		E 85	E 114	E 29	E 34.1%
Metal Mining	10	9	39	30	333.3%
Coal Mining	12	"0"	"0"	"0"	"0"
Oil and Gas Extraction	13	69	68	(1)	-1.4%
Mining of Non-Metallic Minerals, Except Fuels	14	7	7	0	0.0%
Construction		234	190	(44)	-18.8%
General Building Contractors	15	26	17	(9)	-34.6%
Heavy Construction Contractors	16	130	98	(32)	-24.6%
Special Trade Contractors	17	74	71	(3)	-4.1%
Manufacturing		325	259	(66)	-20.3%
Food and Kindred Products	20	46	43	(3)	-6.5%
Textile Mill Products	22				
Apparel and Other Textile Products	23				
Lumber and Wood Products	24	124	123	(1)	-0.8%
Furniture and Fixtures	25				
Paper and Allied Products	26				
Printing and Publishing	27	43	39	(4)	-9.3%
Chemicals and Allied Products	28	8	"0"	"0"	"0"
Petroleum Refining and Related Industries	29				
Rubber and Miscellaneous Plastic Products	30				
Leather and Leather Products	31	"0"	"0"	"0"	"0"
Stone, Clay, Glass, and Concrete Products	32	83	36	(47)	-56.6%
Primary Metals Processing	33				
Fabricated Metal Products	34				
Machinery, Except Electrical	35	"0"	"0"	"0"	"0"
Electrical and Electronic Equipment	36	"0"	"0"	"0"	"0"
Transportation Equipment	37				
Instruments and Related Products	38				
Miscellaneous Manufacturing Industries	39	"0"	"0"	"0"	"0"
Transportation and Public Utilities		198	195	(3)	-1.5%
Local and Interurban Passenger Transit	41				
Trucking and Warehousing	42	70	72	2	2.9%
Water Transportation	44				
Transportation by Air	45	"0"	"0"	"0"	"0"
Pipelines, Except Natural Gas	46				
Transportation Services	47	"0"	"0"	"0"	"0"
Communications	48	36	35	(1)	-2.8%
Electric, Gas, and Sanitary Services	49	81	78	(3)	-3.7%
Wholesale Trade		209	190	(19)	-9.1%
Durable Goods	50	93	77	(16)	-17.2%
Nondurable Goods	51	115	112	(3)	-2.6%
Retail Trade		1,020	1,023	3	0.3%
Building Materials and Hardware	52	48	45	(3)	-6.3%
General Merchandise Stores	53	60	83	23	38.3%
Food Stores	54	188	185	(3)	-1.6%
Automotive Dealers and Service Stations	55	177	157	(20)	-11.3%
Apparel and Accessory Stores	56	58	52	(6)	-10.3%
Furniture and Home Furnishings Stores	57	21	21	0	0.0%
Eating and Drinking Places	58	382	395	13	3.4%
Miscellaneous Retail	59	76	73	(3)	-3.9%
Finance, Insurance, and Real Estate		238	227	(11)	-4.6%
Banking	60	149	131	(18)	-12.1%
Credit Agencies other than Banks	61	29	30	1	3.4%
Security, Commodity Brokers, and Services	62				
Insurance Carriers	63	"0"	"0"	"0"	"0"
Insurance Agents, Brokers, and Services	64	22	23	1	4.5%
Real Estate	65	31	33	2	6.5%
Combined Real Estate, Insurance, Etc.	66	"0"	"0"	"0"	"0"
Holding and Other Investment Offices	67				
Services		959	1,009	50	5.2%
Hotels and Other Lodging Places	70	178	129	(49)	-27.5%
Personal Services	72	40	38	(2)	-5.0%
Business Services	73	31	32	1	3.2%
Auto Repair, Services, and Garages	75	16	15	(1)	-6.3%
Miscellaneous Repair Services	76	10	21	11	110.0%
Motion Pictures	78	"0"	"0"	"0"	"0"
Amusement and Recreation Services	79	38	44	6	15.8%
Private Health Services	80	476	502	26	5.5%
Legal Services	81	23	24	1	4.3%
Private Educational Services	82	18	11	(7)	-38.9%
Private Social Services	83	66	76	10	15.2%
Museums, Art Galleries, Etc.	84	"0"	"0"	"0"	"0"
Membership Organizations Including Tribal Gov't	86	51	39	(12)	-23.5%
Private Households	88	9	13	4	44.4%
Engineering, Accounting, and Other Services	89	22	45	23	104.5%
Non-Classifiable	99				
Government		1,722	1,688	(34)	-2.0%
State		268	262	(6)	-2.2%
Local		1,179	1,140	(39)	-3.3%
Federal		271	279	8	3.0%

*Includes only employment covered by the Unemployment Insurance Program.

**Standard Industrial Classification

***These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.52

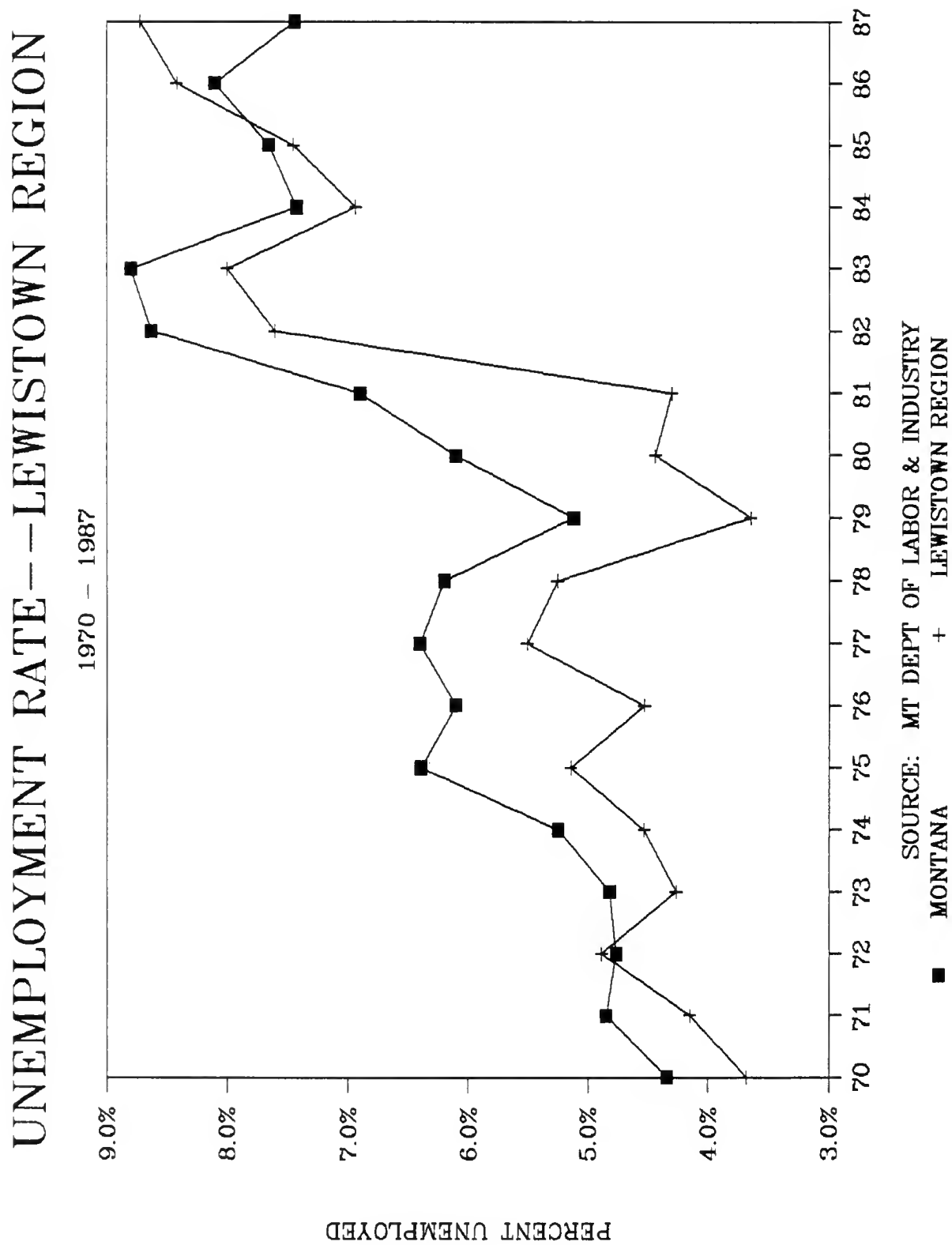
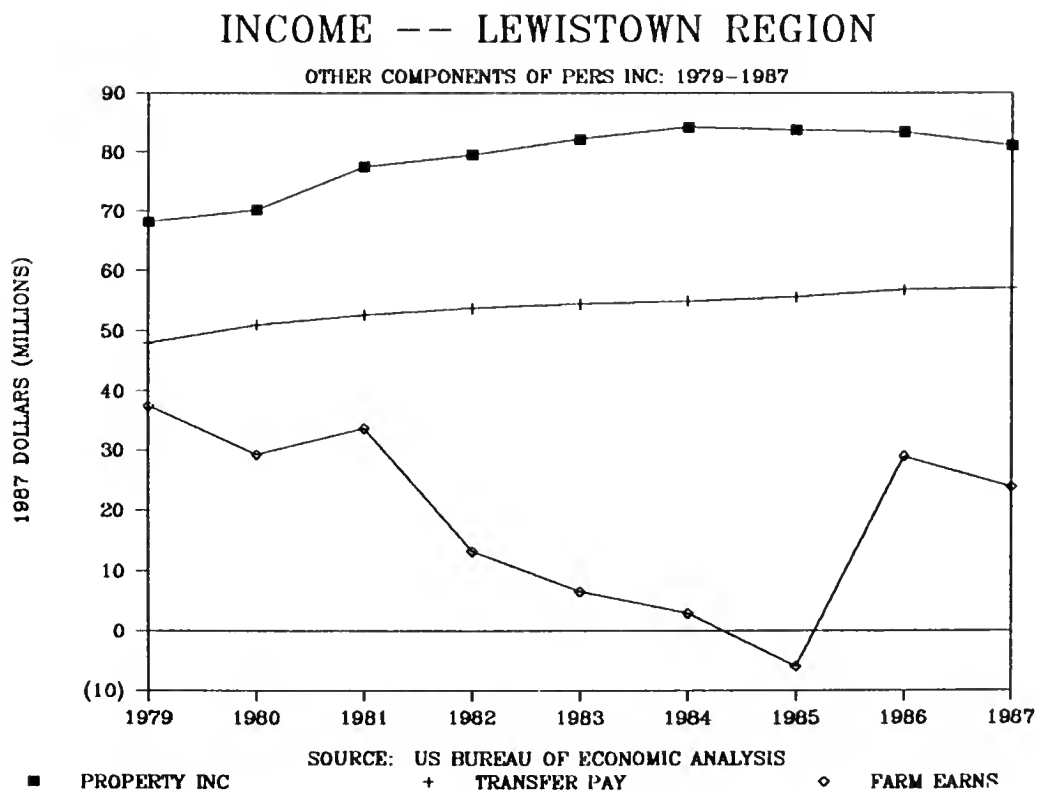
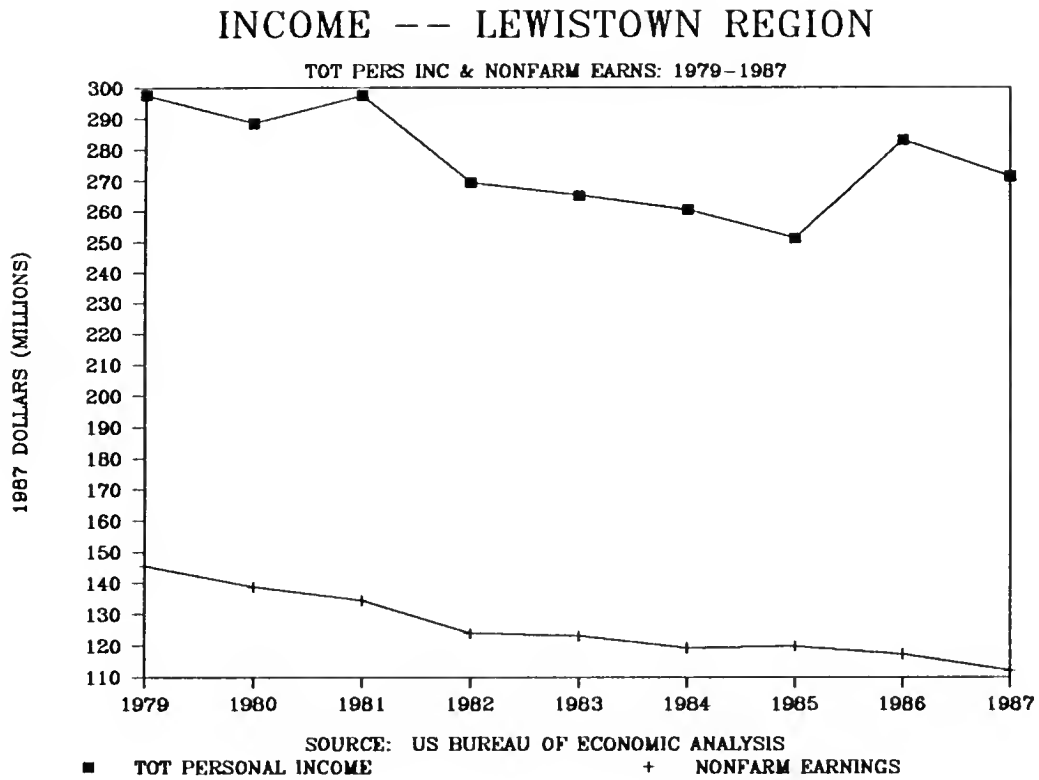


Figure 2.53



The Miles City Region

Located in southeastern Montana, the Miles City Region includes Carter, Custer, Fallon, Powder River, Rosebud, and Treasure counties.

Labor Force

Nearly 17,000 jobs in 1986 ranked the Miles City Region eighth in the state for total jobs (Table 2.38). Approximately three-quarters of these jobs were located in Custer County or Rosebud County, with the other four counties each contributing smaller portions. This region accounted for 4.1 percent of total jobs in Montana in 1986, slightly less than the 4.4 percent figure in 1969 (Figure 2.3).

Between 1969 and 1986, jobs growth depended heavily on the construction industry. Peaks in total and wage/salary jobs occurred in 1975 during a statewide economic slowdown and again in 1982, when total jobs statewide were at a low point (Figures 2.54 and 2.9). These peaks reflect the construction cycles for the four Colstrip electrical generating units in Rosebud County. After 1982, jobs declined steadily as construction activity decreased through 1987.

Historically, the Miles City Region has been primarily an agricultural region. In 1969, agriculture accounted for 27 percent of total jobs in the region. The general statewide decline in agriculture, accompanied by the Colstrip electrical plants and the ensuing coal mining, however, decreased agriculture's share in total jobs to 16 percent in 1986, although still much greater than the statewide average of 9 percent. Other important sectors include services, government, and retail trade.

Heavy construction contractors experienced large increases in employment in the mid-1970s, and coal mining grew over the decade by nearly 1,000 percent, or about 350 jobs. About 200 workers were added in 1975 and 1976 to operate the generating plants. State and local government contributed another 700 jobs over the decade. Other service-producing sectors increased, with private educational and health services, eating/drinking places, wholesale trade, and membership organizations (mainly Northern Cheyenne tribal organizations) all growing substantially. Agriculture was the only sector to decline. Manufacturing was relatively stable with increases in several components including lumber/wood products being counterbalanced by the closure of an establishment producing plastic novelty items.

Between 1979 and 1982, the region again experienced remarkable growth as construction on Colstrip electrical generating units resumed. Wage/salary jobs in the construction sector alone increased by about 2,000. Oil/gas extraction, eating/drinking places, and private business and health services also experienced strong growth. Once again, agriculture declined in employment as did manufacturing (lumber/wood products).

The decline in wage/salary jobs after 1982 was felt throughout the economy as the boom of the preceding years came to an end. Between 1982 and 1986,

construction declined by about the same amount it increased over the 1979-1982 period; oil/gas mining declined more (300 job decline versus a 200 job increase). Construction and oil/gas extraction represented fewer wage/salary jobs in 1986 than in 1969. The service-oriented sectors suffered as well with retail trade (mainly eating/drinking places), various private services, and wholesale trade all experiencing large declines. Growing industries included local government, utilities (the Colstrip electrical plants), and the military (establishment of a small Air Force facility). Decline in agricultural employment slowed. The general continuation of these trends between 1986 and 1987 is shown in Table 2.39.

The large declines in employment after the Colstrip construction should be viewed in context. The construction provided a superficial boost to the economy while it existed. Between 1969 (before construction began) and 1986, total jobs experienced net growth of about 32 percent--the sixth highest percentage growth in the state. Furthermore, the decline in wage/salary jobs shown in Table 2.39 for 1986-1987 overstates the magnitude of the decline that actually occurred in 1987 because better performance in 1987 is "averaged out" by the yearly figures. Comparing the fourth quarter of 1986 with the fourth quarter of 1987 shows that wage/salary jobs declined by only 1.4 percent, or by about 140 jobs.

Historically, the unemployment rate of the Miles City Region was well under the statewide average. This was true in 1987, when the region's unemployment rate of 6.8 percent was the state's third. According to Figure 2.56, the only year that the region's unemployment rate was above the statewide average was 1984, primarily because of high unemployment in Rosebud County associated with the near completion of the Colstrip construction.

Population

With a population of over 33,000 in 1987, the Miles City Region was the eighth largest region. As in other primarily agricultural regions, population growth was very strong prior to 1920. After 1920, however, population declined and stagnated, with growth returning only in recent years (Table 2.8).

Beginning in 1973, substantial population growth characterized this region. As Figure 2.55 illustrates, the population pattern closely followed growth in total jobs, with a lag time of between one and two years. Total jobs peaked first in 1975, and population followed two years later. The low point for total jobs in 1977 was followed again by population the next year, then peaked a second time in 1982. Declining population since 1983 has paralleled the decline in jobs.

Income

Income rankings for the Miles City Region in 1986 varied considerably. Total personal income and transfer payments both ranked ninth, while nonfarm earnings ranked eighth. Property income ranked low at 11th, while farm earnings were relatively high at sixth, reflecting the importance of agriculture to this region.

Changes in farm and nonfarm earnings influenced total personal income (Figure 2.57). Between 1979 and 1982, nonfarm worker earnings rose substantially with wage/salary jobs created by the Colstrip construction. At the same time, however, farm earnings declined dramatically from a peak in 1979. The net result was moderate growth in total income, supported by increases in property income and transfer payments.

After peaking in 1982, nonfarm earnings declined steadily through 1987, again following the trend of wage/salary jobs. During the first part of this period, however, farm earnings were extremely low, partially the result of drought conditions. Thus, the decline in nonfarm earnings translated into a decline in total income. The partial recovery in the agricultural sector in 1986 provided a temporary boost to total personal income, but farm earnings remained unchanged in 1987 and total personal income continued to decline.

Regional per capita income in the Miles City Region ranked fourth in the state for the 1982-1986 period, however, partially because of the strong performance of nonfarm earnings in 1982 and the strong performance of farm earnings in 1986. The trend for per capita income generally was downward for the 1979-1987 period, reflecting population increases and the end of Colstrip construction (Table 2.38). Between 1984 and 1987, regional per capita income was below the statewide average.

Figure 2.54

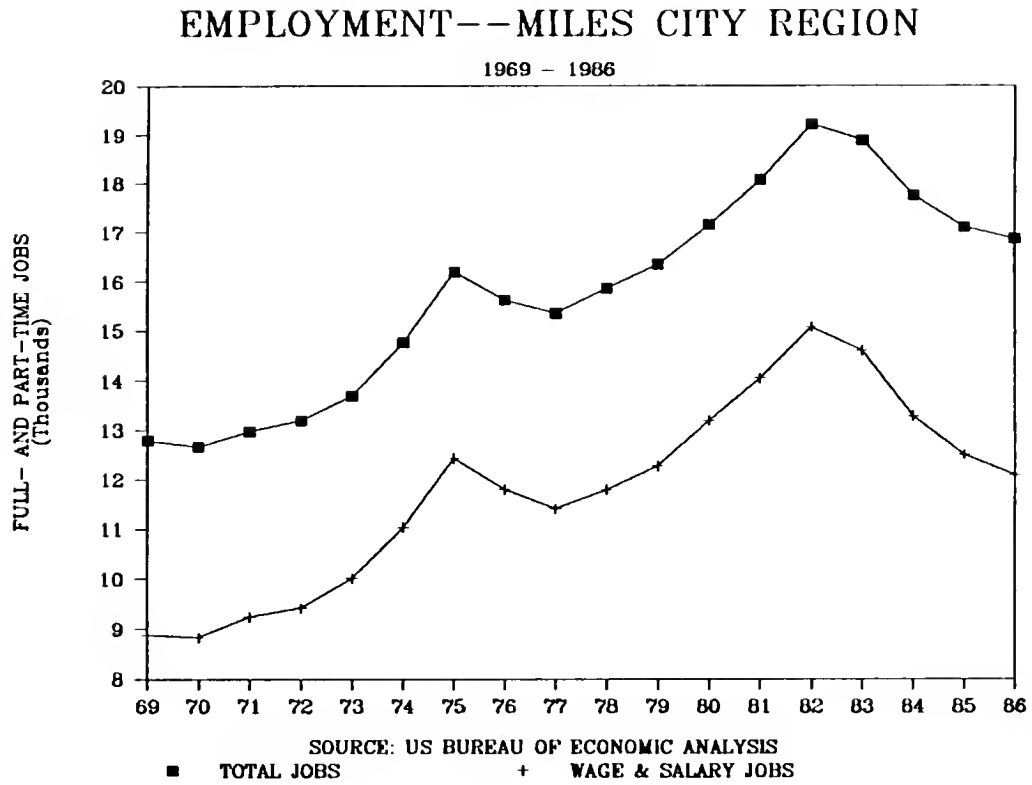


Figure 2.55

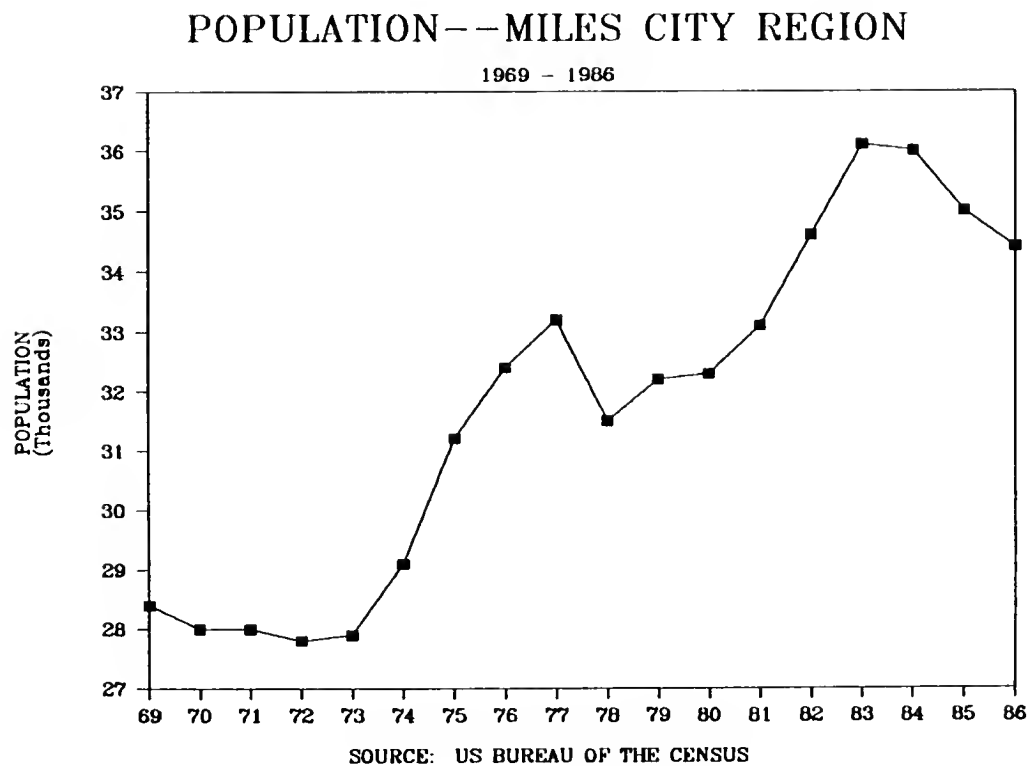


Table 2.38

The Miles City Region												Rank in State /d (Region or County)
	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986	1987 /p	
Population /a												
Region	29,500	28,400	32,200	32,300	33,100	34,600	36,100	36,000	35,000	34,600	33,400	8
Carter	2,500	2,000	1,800	1,800	1,700	1,700	1,800	1,700	1,800	1,700	1,700	50
Custer	13,100	12,300	13,200	13,100	13,200	13,400	13,500	13,500	13,400	13,100	12,700	12
Fallon	4,000	4,100	3,900	3,800	3,700	3,800	3,800	3,800	3,800	3,800	3,500	39
Powder River	2,500	2,800	2,500	2,500	2,500	2,500	2,500	2,500	2,400	2,400	2,300	46
Rosebud	4,100	4,100	9,700	10,100	11,000	12,200	13,500	13,500	12,600	12,600	12,300	15
Treasure	1,300	1,100	1,100	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	55
Total Jobs /b												
Region	...	12,796	18,339	17,162	18,075	19,212	18,890	17,756	17,097	16,858	...	8
Carter	...	1,034	967	945	971	973	957	948	935	956	...	50
Custer	...	5,481	4,933	7,060	8,748	4,587	4,710	8,860	4,768	6,759	...	12
Fallon	...	1,774	2,118	2,159	2,123	2,063	1,978	1,977	1,911	1,843	...	38
Powder River	...	1,405	1,399	1,399	1,418	1,463	1,437	1,365	1,378	1,375	...	43
Rosebud	...	2,583	4,455	5,100	4,354	7,669	7,353	6,140	5,630	5,449	...	17
Treasure	...	519	489	479	461	457	457	466	455	476	...	55
Wage & Salary Jobs /b												
Region	...	8,877	12,268	13,189	14,038	15,067	14,590	13,278	12,495	12,078	...	8
Carter	...	434	463	475	495	495	462	451	437	451	...	52
Custer	...	4,370	5,476	5,662	3,329	5,137	5,208	5,228	3,091	4,973	...	12
Fallon	...	1,164	1,523	1,594	1,350	1,482	1,380	1,378	1,303	1,220	...	37
Powder River	...	764	842	840	855	872	813	717	716	689	...	46
Rosebud	...	1,850	3,670	4,327	5,334	6,814	6,463	3,231	4,688	4,467	...	13
Treasure	...	295	294	291	276	287	264	273	260	278	...	54
Unemployment Rate /c												
Region	...	2.9%	3.9%	4.2%	4.8%	5.6%	7.3%	7.7%	7.2%	7.7%	6.8%	3
Carter	...	3.3%	7.8%	4.0%	1.8%	3.5%	5.6%	3.3%	2.4%	3.7%	3.6%	3
Custer	...	3.2%	3.4%	3.8%	4.9%	6.2%	8.2%	5.3%	5.5%	6.3%	5.6%	16
Fallon	...	2.8%	2.1%	2.1%	2.2%	3.9%	5.8%	4.7%	8.0%	10.6%	7.2%	29
Powder River	...	1.4%	2.8%	2.8%	2.1%	3.2%	4.2%	2.4%	4.4%	4.3%	4	
Rosebud	...	3.1%	9.0%	5.7%	7.0%	6.4%	9.2%	12.7%	11.4%	10.4%	9.6%	47
Treasure	...	3.2%	3.2%	3.5%	2.7%	5.2%	7.3%	8.9%	8.1%	4.7%	5.0%	10
Total Personal Income (\$1000s) /b												
Region	189,942	283,267	416,337	626,494	458,679	443,453	432,802	414,417	395,594	408,117	395,000	9
Carter	12,934	23,460	23,732	20,987	18,462	13,287	13,120	15,621	14,549	20,709	...	51
Custer	94,590	128,509	181,145	185,511	173,808	168,826	170,638	174,986	173,725	171,253	...	12
Fallon	22,058	37,007	54,441	59,566	56,827	53,020	48,274	49,179	46,017	45,871	...	38
Powder River	17,311	29,184	36,518	33,350	33,970	30,314	27,865	26,444	24,808	29,920	...	46
Rosebud	34,714	51,015	103,594	111,022	141,853	165,641	160,418	137,010	124,584	126,192	...	18
Treasure	8,335	14,092	14,907	15,858	13,759	12,365	12,687	11,173	11,911	14,071	...	55
Per Capita Personal Income /b												
Region	8,439	9,993	12,932	13,203	13,226	12,837	11,981	11,645	11,328	11,869	11,800	4
Carter	5,174	11,694	13,075	11,731	10,579	7,757	7,467	8,973	8,266	12,026	...	55
Custer	7,221	10,452	13,753	14,119	13,136	12,642	12,642	12,923	12,984	13,076	...	7
Fallon	5,514	9,132	14,089	15,839	15,178	13,971	12,641	13,111	12,219	12,706	...	4
Powder River	4,924	10,297	15,141	13,356	13,725	12,268	11,168	10,439	10,147	12,314	...	26
Rosebud	5,691	8,415	10,657	10,974	12,932	13,594	11,863	10,133	9,913	10,048	...	29
Treasure	8,412	12,836	13,816	16,083	13,705	12,110	12,078	10,702	11,864	14,100	...	15
Nonfarm Earnings (\$1000s) /b												
Region	114,624	155,913	260,622	280,451	309,792	358,120	342,282	293,387	269,854	256,320	247,000	8
Carter	4,262	5,856	4,560	4,305	4,022	6,005	5,969	8,020	5,663	5,502	...	52
Custer	68,048	83,988	115,235	115,033	101,585	97,808	99,844	102,113	100,392	96,244	...	13
Fallon	15,372	22,661	36,810	62,129	38,051	36,415	32,122	32,412	30,564	27,750	...	34
Powder River	5,783	10,732	15,532	15,425	16,059	17,599	15,164	13,417	13,514	12,418	...	43
Rosebud	18,310	29,158	80,088	87,427	144,023	196,261	185,204	135,182	115,860	110,196	...	10
Treasure	2,849	3,518	4,394	4,133	4,052	4,014	3,979	4,043	4,060	4,209	...	54
Farm Earnings (\$1000s) /b												
Region	40,967	75,180	59,764	48,965	38,388	12,641	10,070	14,894	14,623	35,258	35,000	6
Carter	4,423	13,349	9,945	7,105	4,338	(940)	(1,620)	140	(842)	5,417	...	32
Custer	7,681	17,199	11,409	12,935	9,707	5,259	5,129	8,043	9,908	10,898	...	13
Fallon	3,651	9,758	4,723	5,441	5,095	2,370	1,607	2,198	1,170	3,575	...	46
Powder River	9,123	13,763	13,261	7,665	7,410	2,138	1,731	1,620	861	8,693	...	28
Rosebud	10,019	12,696	15,093	9,570	8,236	2,072	1,343	1,426	1,663	4,515	...	38
Treasure	3,870	8,415	5,332	4,029	3,403	1,742	1,879	1,267	1,864	4,140	...	41
Property Income (\$1000s) /b												
Region	23,438	35,710	68,103	71,438	79,206	83,189	80,452	80,771	78,785	78,400	75,000	11
Carter	1,317	2,342	4,879	5,062	5,505	5,199	5,853	4,465	4,817	8,745	...	47
Custer	13,247	18,674	34,791	35,708	38,995	41,046	39,611	38,621	37,129	36,958	...	13
Fallon	2,009	3,647	4,921	7,755	9,105	9,380	9,348	9,287	9,201	9,183	...	43
Powder River	1,620	3,081	8,181	8,436	8,778	9,915	8,842	6,643	6,583	8,597	...	48
Rosebud	4,199	4,214	12,228	13,341	15,457	18,752	15,184	14,090	15,472	15,783	...	35
Treasure	995	1,352	3,102	3,137	3,368	3,597	3,615	3,285	3,384	3,354	...	55
Transfer Payments (\$1000s) /b												
Region	16,049	27,173	47,864	51,090	53,562	54,044	60,181	62,295	62,898	64,653	85,000	9
Carter	1,206	1,880	2,560	2,712	2,866	2,922	3,165	3,022	3,168	3,268	...	53
Custer	7,710	13,448	23,454	24,881	25,902	26,810	28,443	29,449	30,342	31,452	...	14
Fallon	1,765	2,950	5,541	5,758	5,890	4,029	4,158	4,123	4,243	4,578	...	42
Powder River	895	1,467	2,897	2,945	3,084	3,272	3,560	3,707	3,720	3,882	...	50
Rosebud	3,837	8,447	12,074	13,302	14,249	15,414	16,910	18,208	17,568	17,811	...	25
Treasure	434	781	1,339	1,492	1,550	1,599	1,725	1,765	1,857	1,862	...	55

/a U.S. Bureau of the Census

/b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average)

/p 1987 data consists of preliminary estimates.

Table 2.39

WAGE & SALARY EMPLOYMENT IN THE MILES CITY REGION*: 1986-1987

INDUSTRY	SIC** CODE	1986	1987	CHANGE	PERCENT CHANGE
Total Wage and Salary Employment		10,065	9,678	(387)	-3.8%
Total Private		7,178	6,805	(373)	-5.2%
Agriculture, Forestry, Fishing, Hunting, & Trapping		81	89	8	9.9%
Agricultural Production--Crops ***	01	8	5	(3)	-37.5%
Agricultural Production--Livestock ***	02	53	60	7	13.2%
Agricultural Services	07	17	21	4	23.5%
Forestry	08				
Fishing, Hunting, and Trapping	09				
Mining		692	538	(154)	-22.3%
Metal Mining	10				
Coal Mining	12	*0*	*0*	*0*	*0*
Oil and Gas Extraction	13	181	112	(69)	-38.1%
Mining of Non-Metallic Minerals, Except Fuels	14	*0*	*0*	*0*	*0*
Construction		284	266	(18)	-6.3%
General Building Contractors	15	61	69	8	13.1%
Heavy Construction Contractors	16	122	116	(6)	-4.9%
Special Trade Contractors	17	96	77	(19)	-19.8%
Manufacturing		211	241	30	14.2%
Food and Kindred Products	20	47	43	(4)	-8.5%
Textile Mill Products	22				
Apparel and Other Textile Products	23				
Lumber and Wood Products	24	18	34	16	88.9%
Furniture and Fixtures	25		*0*	*0*	*0*
Paper and Allied Products	26				
Printing and Publishing	27	95	88	(7)	-7.4%
Chemicals and Allied Products	28				
Petroleum Refining and Related Industries	29	*0*	*0*	*0*	*0*
Rubber and Miscellaneous Plastic Products	30	*0*	*0*	*0*	*0*
Leather and Leather Products	31				
Stone, Clay, Glass, and Concrete Products	32	22	22	0	0.0%
Primary Metals Processing	33				
Fabricated Metal Products	34	*0*	*0*	*0*	*0*
Machinery, Except Electrical	35				
Electrical and Electronic Equipment	36				
Transportation Equipment	37				
Instruments and Related Products	38				
Miscellaneous Manufacturing Industries	39				
Transportation and Public Utilities		1,335	1,252	(83)	-6.2%
Local and Interurban Passenger Transit	41	41	42	1	2.4%
Trucking and Warehousing	42	259	200	(59)	-22.8%
Water Transportation	44				
Transportation by Air	45	7	7	0	0.0%
Pipelines, Except Natural Gas	46	*0*	*0*	*0*	*0*
Transportation Services	47	*0*	*0*	*0*	*0*
Communications	48	104	91	(13)	-12.5%
Electric, Gas, and Sanitary Services	49	897	884	(13)	-1.4%
Wholesale Trade		368	375	7	1.9%
Durable Goods	50	134	130	(4)	-3.0%
Nondurable Goods	51	232	243	11	4.7%
Retail Trade		1,695	1,626	(69)	-4.1%
Building Materials and Hardware	52	91	82	(9)	-9.9%
General Merchandise Stores	53	147	105	(42)	-28.6%
Food Stores	54	273	260	(13)	-4.8%
Automotive Dealers and Service Stations	55	224	204	(20)	-8.9%
Apparel and Accessory Stores	56	63	58	(5)	-7.9%
Furniture and Home Furnishings Stores	57	28	23	(5)	-17.9%
Eating and Drinking Places	58	696	685	(11)	-1.6%
Miscellaneous Retail	59	120	118	(2)	-1.7%
Finance, Insurance, and Real Estate		423	404	(19)	-4.5%
Banking	60	228	216	(12)	-5.3%
Credit Agencies other than Banks	61	27	28	1	3.7%
Security, Commodity Brokers, and Services	62		*0*	*0*	*0*
Insurance Carriers	63				
Insurance Agents, Brokers, and Services	64	65	70	5	7.7%
Real Estate	65	100	83	(17)	-17.0%
Combined Real Estate, Insurance, Etc.	66	*0*	*0*	*0*	*0*
Holding and Other Investment Offices	67	*0*	*0*	*0*	*0*
Services		E 2,045	E 1,971	E (74)	E -3.6%
Hotels and Other Lodging Places	70	168	148	(20)	-11.9%
Personal Services	72	69	74	5	7.2%
Business Services	73	101	113	12	11.9%
Auto Repair, Services, and Garages	75	67	65	(2)	-3.0%
Miscellaneous Repair Services	76	17	16	(1)	-5.9%
Motion Pictures	78	24	20	(4)	-16.7%
Amusement and Recreation Services	79	93	94	1	1.1%
Private Health Services	80	689	686	(3)	-0.4%
Legal Services	81	36	39	3	8.3%
Private Educational Services	82	348	319	(29)	-8.3%
Private Social Services	83	82	79	(3)	-3.7%
Museums, Art Galleries, Etc.	84	*0*	*0*	*0*	*0*
Membership Organizations Including Tribal Gov't	86	301	268	(33)	-11.0%
Private Households	88	3	3	0	0.0%
Engineering, Accounting, and Other Services	89	47	47	0	0.0%
Non-Classifiable	99	*0*	*0*	*0*	*0*
Government		2,884	2,870	(14)	-0.5%
State		354	352	(2)	-0.6%
Local		1,930	1,876	(54)	-2.8%
Federal		595	638	43	7.2%

*Includes only employment covered by the Unemployment Insurance Program.

**Standard Industrial Classification

***These values represent a very small portion of wage/salary employment for this industry.

0 indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.56

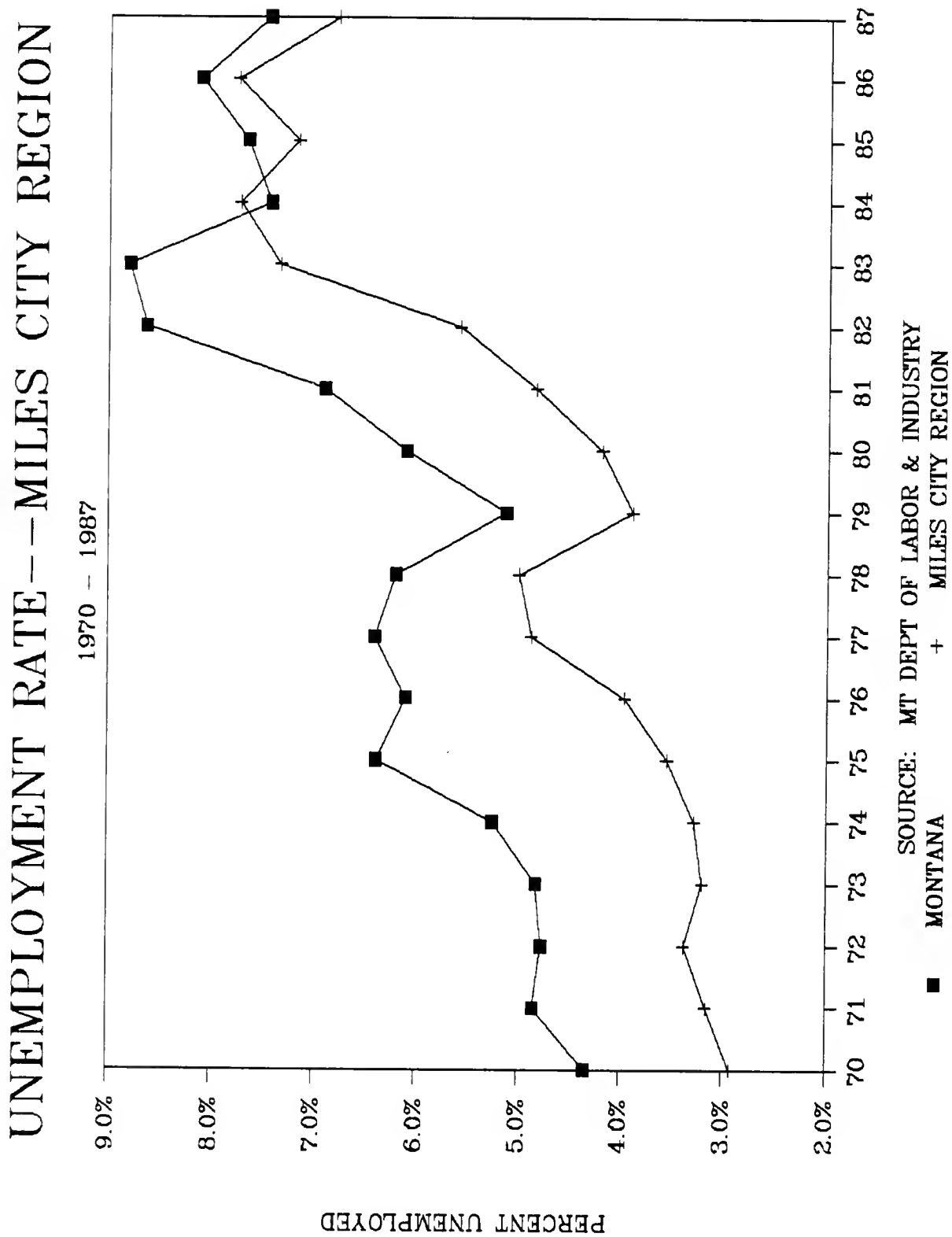
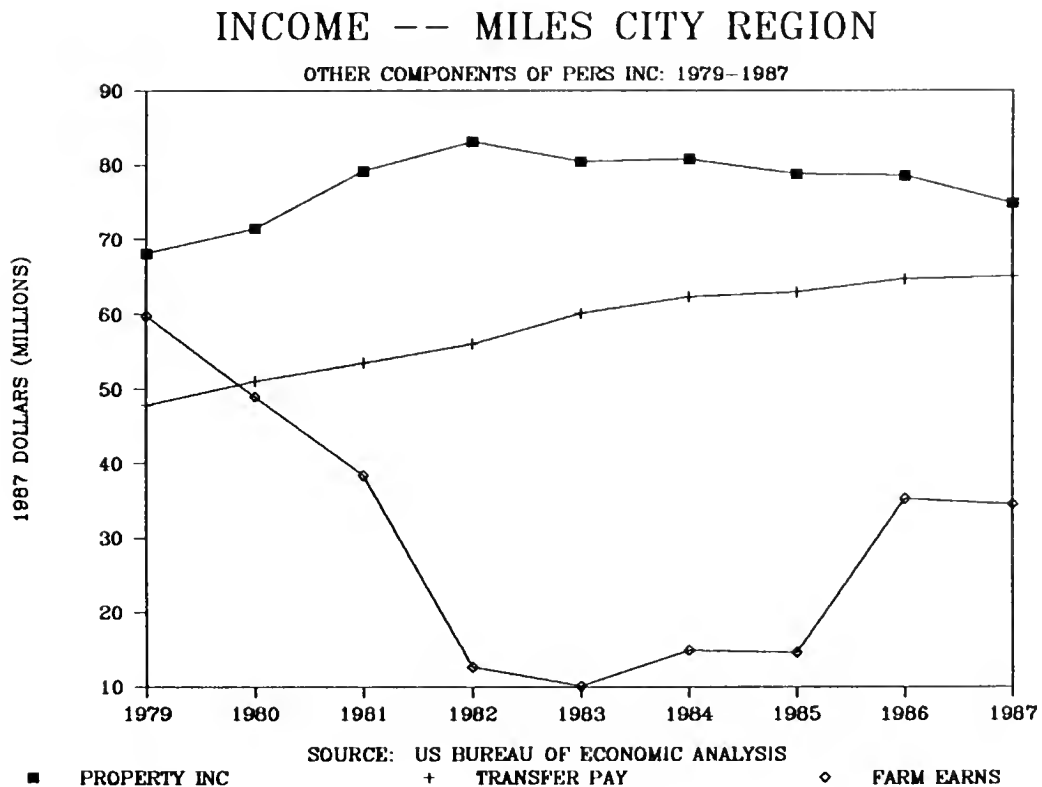
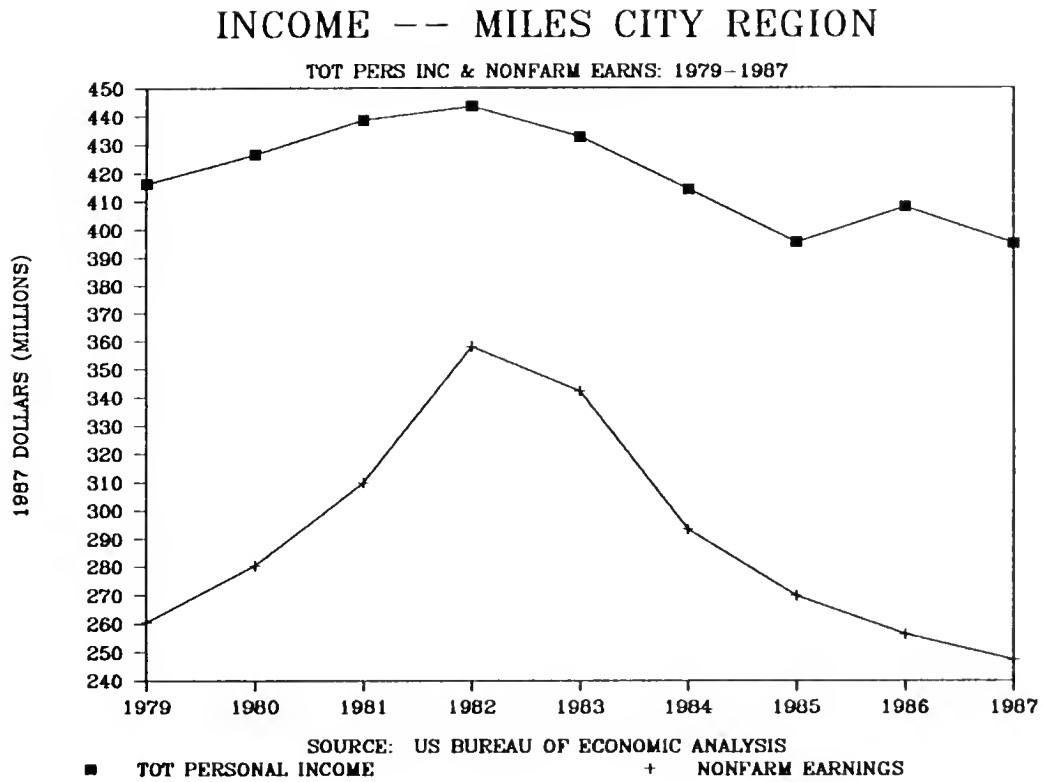


Figure 2.57



The Missoula Region

Located in western Montana, the Missoula Region includes Mineral, Missoula, and Ravalli counties.

Labor Force

In 1986, the Missoula Region ranked third in the state for both total and wage/salary jobs. Approximately 80 percent of the jobs were located in Missoula County, which also ranked third for total jobs among Montana's counties (Table 2.40). The region's 51,600 jobs accounted for 12.7 percent of the state's total in 1986, up from 10.4 percent in 1969.

Comparing Figure 2.58 and Figure 2.9, it is obvious that job growth in the Missoula Region has followed job growth statewide closely. The 1970s experienced exceptionally strong growth, with jobs declining only in 1975 when the nation experienced a recession and Montana suffered from economic stagnation. The 1980 recession, however, began a downward turn in jobs that continued for the next several years. Beginning in 1983, growth returned to the Missoula Region and continued through 1987 (Table 2.40).

Figure 2.58 also illustrates the importance of self-employment to the Missoula Region, particularly in recent years. For example, between 1984 and 1986, wage/salary jobs exhibited virtually no growth. But during these years, total jobs continued to grow because of strong performance in self-employment. In 1986, self-employment accounted for 23 percent of jobs in the region, somewhat below the state average of 26 percent, but well above the 1969 level of 15 percent. Furthermore, the growth rate for the self-employed between 1979 and 1986 was 35 percent, compared to the overall decline of 2 percent in wage/salary jobs (Table 2.5).

The regional economy differs from the rest of the state primarily because of the importance of manufacturing (mainly the lumber/wood products industry). Though down from a figure of 18 percent in 1969, manufacturing accounted for 13 percent of wage/salary jobs in 1986, much higher than the statewide average of 7 percent. Other important sectors include services, retail trade, and government (particularly the University of Montana in Missoula).

Wage/salary jobs increased in nearly every major sector during the 1970s. Agriculture grew because its self-employed component increased. State/local government, eating/drinking places, building construction, private health services, lumber/wood products manufacturing, wholesale trade, business services, trucking, and banking all experienced exceptional growth as total wage/salary employment grew by 56 percent.

Between 1979 and 1986, however, the region witnessed a small net decline in wage/salary jobs (although growth in self-employment was sufficient to keep total jobs growing). For sectors experiencing strong growth in the 1970s, growth continued for private health services, eating/drinking places, trucking, and business services. Other growing sectors included food stores and private social services. Lumber/wood products, building construction,

federal/state government, and wholesale trade each lost wage/salary jobs. Declines also were experienced by the automobile dealer/service station, food processing, and communications sectors. As Figure 2.58 illustrates, however, the overall decline in wage/salary jobs was reversed in 1983, and by 1986 wage/salary jobs almost achieved their previous peak in 1979.

Recovery was evident in 1986-1987 when wage/salary jobs posted a strong increase of 684 jobs (Table 2.41). Large declines in local/state government, heavy construction contractors, and lumber/wood products were more than offset by gains elsewhere. Growth was particularly strong in services (especially in private health and social services), retail trade, and finance/insurance/real estate (excluding banks).

The relatively low regional unemployment rate of 6.9 percent in 1987 ranked fifth in the state. As Figure 2.60 shows, this rate was lower than the statewide average, and much lower than previous levels in the 1980s. Also, 1987 was basically the first year that regional unemployment was lower than unemployment statewide. Past high unemployment rates generally were attributed to year-to-year volatility and seasonality in the lumber/wood products industry. Thus, the declining share of lumber/wood products in total jobs as well as the strong performance of the other economic sectors partially explains the declining unemployment rates of recent years.

Population

A population of over 107,000 in 1987 made the Missoula Region the state's third largest. Most of the population was located in Missoula County, the second most populous county in the state. Although early population growth stagnated from 1910 to 1930, growth was strong in the following decades (Table 2.8). Population growth between 1969 and 1986 was especially strong, (Figure 2.59), and the region's growth rate of 44 percent was one of the state's highest. Between 1986 and 1987, however, population stagnated in the region, while declining statewide.

Population in the Missoula Region closely followed trends at the state level between 1969 and 1986 (Figures 2.10 and 2.59). More significantly, however, population also followed trends in the region's total jobs, with a lag time of about one year (Figures 2.58 and 2.59). When jobs declined slightly between 1974 and 1975, population growth slowed with no appreciable lag. By the 1980 recession, though, when total jobs once again declined, a lag of one year occurred with population growth slowing in 1981 before turning negative in 1982. Jobs growth resumed in 1983, accompanied by slight population growth in 1983 and strong growth through 1986.

Income

As with jobs and population, the Missoula Region ranked third statewide in total personal income in 1986 (Table 2.40). Ranks for income components were similar, with the exception of farm earnings, which ranked 11th and accounted for a very small share of total income.

Because regional farm earnings were so small, their effect on total personal income also was minimal. As a result, changes in total personal income closely followed corresponding changes in nonfarm earnings throughout the 1979-1987 period (Figure 2.61).

A sharp decline in nonfarm jobs between 1979 and 1982 produced a similar decline in nonfarm earnings during the national recession. Post-recession recovery was strong in both total income and nonfarm earnings in 1983 and 1984, but during the Montana recession in 1985, nonfarm earnings stagnated. Total personal income did increase very slightly between 1984 and 1987, however, as transfer payments and farm earnings posted modest gains. Overall, total personal income grew by only 2.7 percent between 1979 and 1986, slightly less than the Montana average of 3 percent.

The Missoula Region ranked eighth in the state in per capita income for the 1982-1986 period, and remained below the state average for every year in this period (Table 2.40). For a few years, Missoula County was slightly higher than the state in per capita income, but both Ravalli and Mineral counties were consistently below the Montana average. After declining from over \$12,200 in 1979, per capita income in 1984 leveled at \$11,700 and remained there through 1987.

^^^ ^^^ ^^^ ^^^ ^^^

Figure 2.58



Figure 2.59

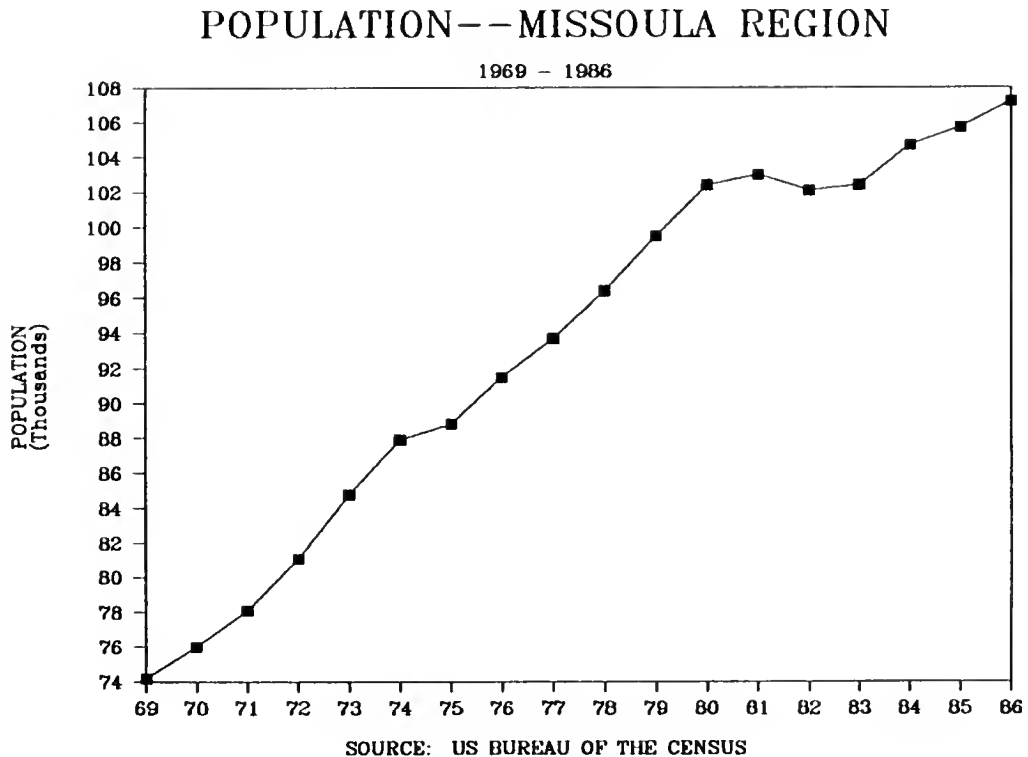


Table 2.40

The Missoula Region											Rank in State /d (Region or County)	
	1959	1969	1979	1980	1981	1982	1983	1984	1985	1986	1987 /p	
Population /a												
Region	59,500	74,200	99,500	102,400	103,000	102,100	102,400	104,700	105,700	107,200	107,100	3
Mineral	3,000	3,000	3,700	3,700	3,600	3,500	3,500	3,700	3,700	3,600	3,500	58
Missoula	44,500	57,000	74,100	76,100	76,200	75,100	75,100	76,500	77,300	78,600	78,400	2
Ravalli	12,200	14,200	21,700	22,600	23,200	23,500	23,800	24,500	24,700	25,000	25,200	8
Total Jobs /b												
Region	...	30,507	49,061	47,896	46,163	45,036	47,406	50,093	50,902	51,593	...	3
Mineral	...	1,245	1,614	1,554	1,526	1,383	1,595	1,675	1,605	1,541	...	41
Missoula	...	24,279	39,984	58,967	57,066	57,871	57,871	40,074	40,828	41,373	...	3
Ravalli	...	4,783	7,463	7,575	7,571	7,485	7,940	8,344	8,469	8,679	...	9
Wage & Salary Jobs /b												
Region	...	25,736	40,152	39,053	37,128	35,659	37,444	39,260	39,515	39,333	...	3
Mineral	...	1,066	1,254	1,194	1,162	1,016	1,195	1,264	1,177	1,094	...	38
Missoula	...	21,528	34,032	53,099	51,120	29,949	31,325	32,883	33,195	33,228	...	3
Ravalli	...	3,142	4,866	4,760	4,846	4,694	4,924	5,111	5,143	5,211	...	11
Unemployment Rate /c												
Region	...	5.2%	6.6%	8.2%	9.7%	10.8%	9.3%	7.5%	8.0%	8.0%	6.9%	5
Mineral	...	6.2%	7.5%	10.2%	12.6%	22.5%	15.3%	12.8%	14.3%	15.0%	10.5%	51
Missoula	...	4.7%	6.4%	7.6%	9.2%	9.2%	8.0%	6.4%	7.1%	7.2%	6.2%	20
Ravalli	...	6.7%	7.6%	10.3%	11.1%	14.6%	13.3%	10.5%	10.3%	10.1%	8.9%	42
Total Personal Income (\$1000s) /b												
Region	457,430	685,906	1,217,862	1,188,895	1,151,039	1,130,255	1,172,358	1,220,575	1,232,801	1,250,531	1,251,000	3
Mineral	16,101	25,083	36,888	34,259	34,525	31,719	36,078	36,685	35,743	34,359	...	43
Missoula	359,258	527,916	950,248	925,933	886,221	872,566	898,863	957,886	945,017	957,082	...	3
Ravalli	82,070	112,907	230,727	228,703	230,293	225,949	237,417	246,004	252,041	259,090	...	8
Per Capita Personal Income /b												
Region	7,688	8,977	12,236	11,611	11,178	11,060	11,436	11,659	11,660	11,661	11,700	8
Mineral	5,367	8,464	9,898	9,381	9,723	8,965	10,197	9,966	9,755	9,494	...	48
Missoula	8,110	9,266	12,826	12,168	11,624	11,615	11,963	12,265	12,222	12,171	...	18
Ravalli	6,727	7,951	10,625	10,101	9,934	9,602	9,961	10,025	10,187	10,367	...	43
Nonfarm Earnings (\$1000s) /b												
Region	341,250	524,809	915,313	866,632	800,522	762,281	812,554	848,526	848,196	848,657	853,000	3
Mineral	11,935	19,543	26,589	23,153	23,399	18,703	24,721	25,583	23,099	21,769	...	37
Missoula	287,710	441,093	782,001	745,831	681,518	652,876	690,229	720,583	719,948	719,161	...	2
Ravalli	41,585	64,172	106,923	99,647	95,606	90,702	97,604	102,561	105,149	107,727	...	11
Farm Earnings (\$1000s) /b												
Region	19,094	8,846	10,951	10,170	5,058	2,109	3,268	4,977	5,455	12,817	14,000	11
Mineral	906	122	599	465	388	378	481	494	634	729	...	55
Missoula	6,400	2,475	4,540	4,080	1,950	1,058	1,978	2,326	2,049	4,559	...	40
Ravalli	11,787	6,249	5,811	5,625	2,720	674	809	2,157	2,771	7,729	...	24
Property Income (\$1000s) /b												
Region	65,525	90,415	191,599	195,083	206,760	218,837	209,787	223,738	226,732	227,623	221,000	4
Mineral	1,417	2,049	3,727	3,676	3,980	4,206	3,871	4,003	4,589	4,673	...	52
Missoula	48,473	67,433	132,506	134,861	140,702	150,727	141,103	152,702	154,554	155,367	...	3
Ravalli	15,635	20,933	55,366	56,546	62,078	63,904	64,814	67,033	67,588	67,382	...	8
Transfer Payments (\$1000s) /b												
Region	44,311	73,664	169,970	185,246	194,628	201,945	206,812	210,259	220,269	228,702	230,000	4
Mineral	1,990	3,081	6,362	7,260	7,433	9,131	8,366	8,122	8,562	8,649	...	38
Missoula	32,439	53,268	122,200	132,555	137,741	141,014	144,701	145,918	152,887	159,629	...	3
Ravalli	9,882	17,316	41,408	45,431	49,455	51,801	53,745	56,219	58,840	60,423	...	8

/a U.S. Bureau of the Census

/b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average)

/p 1987 data consists of preliminary estimates.

Table 2.41 WAGE & SALARY EMPLOYMENT IN THE MISSOULA REGION*: 1986-1987

INDUSTRY	SIC** CODE	1986	1987	CHANGE	PERCENT CHANGE
Total Wage and Salary Employment		34,721	35,485	684	2.0%
Total Private		27,230	28,010	780	2.9%
Agriculture, Forestry, Fishing, Hunting, & Trapping		255	*0*	*0*	*0*
Agricultural Production--Crops ***	01	18	20	2	11.1%
Agricultural Production--Livestock ***	02	53	51	(2)	-3.8%
Agricultural Services	07	110	124	14	12.7%
Forestry	08	70	61	(9)	-12.9%
Fishing, Hunting, and Trapping	09		*0*	*0*	*0*
Mining		*0*	23	*0*	*0*
Metal Mining	10	5	12	7	140.0%
Coal Mining	12				
Oil and Gas Extraction	13	*0*		*0*	*0*
Mining of Non-Metallic Minerals, Except Fuels	14	48	11	(37)	-77.1%
Construction		1,294	1,194	(100)	-7.7%
General Building Contractors	15	327	379	52	15.9%
Heavy Construction Contractors	16	285	151	(134)	-47.0%
Special Trade Contractors	17	679	663	(16)	-2.4%
Manufacturing		4,878	4,923	45	0.9%
Food and Kindred Products	20	270	296	26	9.6%
Textile Mill Products	22	*0*		*0*	*0*
Apparel and Other Textile Products	23	61	42	(19)	-31.1%
Lumber and Wood Products	24	2,812	2,716	(96)	-3.4%
Furniture and Fixtures	25	147	142	(5)	-3.4%
Paper and Allied Products	26	*0*	*0*	*0*	*0*
Printing and Publishing	27	312	317	5	1.6%
Chemicals and Allied Products	28	30	32	2	6.7%
Petroleum Refining and Related Industries	29	*0*	*0*	*0*	*0*
Rubber and Miscellaneous Plastic Products	30	*0*	*0*	*0*	*0*
Leather and Leather Products	31	*0*		*0*	*0*
Stone, Clay, Glass, and Concrete Products	32	66	80	14	21.2%
Primary Metals Processing	33	*0*		*0*	*0*
Fabricated Metal Products	34	126	100	(26)	-20.6%
Machinery, Except Electrical	35	32	105	73	228.1%
Electrical and Electronic Equipment	36	15	*0*	*0*	*0*
Transportation Equipment	37	*0*	*0*	*0*	*0*
Instruments and Related Products	38	117	117	0	0.0%
Miscellaneous Manufacturing Industries	39	112	207	95	84.8%
Transportation and Public Utilities		2,222	2,244	22	1.0%
Local and Interurban Passenger Transit	41	132	168	36	27.3%
Trucking and Warehousing	42	1,192	1,154	(38)	-3.2%
Water Transportation	44				
Transportation by Air	45	83	121	38	45.8%
Pipelines, Except Natural Gas	46				
Transportation Services	47	88	95	7	8.0%
Communications	48	402	385	(17)	-4.2%
Electric, Gas, and Sanitary Services	49	319	316	(3)	-0.9%
Wholesale Trade		1,546	1,542	(4)	-0.3%
Durable Goods	50	871	934	63	7.2%
Nondurable Goods	51	673	608	(65)	-9.7%
Retail Trade		7,587	7,806	219	2.9%
Building Materials and Hardware	52	260	259	(1)	-0.4%
General Merchandise Stores	53	759	855	96	12.6%
Food Stores	54	1,097	1,094	(3)	-0.3%
Automotive Dealers and Service Stations	55	937	972	35	3.7%
Apparel and Accessory Stores	56	352	361	9	2.6%
Furniture and Home Furnishings Stores	57	286	295	9	3.1%
Eating and Drinking Places	58	2,868	2,904	36	1.3%
Miscellaneous Retail	59	1,019	1,057	38	3.7%
Finance, Insurance, and Real Estate		1,436	1,533	97	6.8%
Banking	60	520	503	(17)	-3.3%
Credit Agencies other than Banks	61	278	285	7	2.5%
Security, Commodity Brokers, and Services	62	60	65	5	8.3%
Insurance Carriers	63	35	44	9	25.7%
Insurance Agents, Brokers, and Services	64	228	231	3	1.3%
Real Estate	65	289	308	19	6.6%
Combined Real Estate, Insurance, Etc.	66	15	17	2	13.3%
Holding and Other Investment Offices	67	3	74	71	2366.7%
Services		7,940	8,468	528	6.6%
Hotels and Other Lodging Places	70	728	738	10	1.4%
Personal Services	72	377	389	12	3.2%
Business Services	73	920	918	(2)	-0.2%
Auto Repair, Services, and Garages	75	362	358	(4)	-1.1%
Miscellaneous Repair Services	76	183	252	69	37.7%
Motion Pictures	78	64	56	(8)	-12.5%
Amusement and Recreation Services	79	342	401	59	17.3%
Private Health Services	80	3,375	3,492	117	3.5%
Legal Services	81	305	328	23	7.5%
Private Educational Services	82	71	84	13	18.3%
Private Social Services	83	575	731	156	27.1%
Museums, Art Galleries, Etc.	84				
Membership Organizations Including Tribal Gov't	86	232	297	65	28.0%
Private Households	88	47	61	14	29.8%
Engineering, Accounting, and Other Services	89	344	347	3	0.9%
Non-Classifiable	99	*0*	*0*	*0*	*0*
Government		7,491	7,393	(98)	-1.3%
State		2,189	2,139	(50)	-2.3%
Local		3,565	3,467	(98)	-2.7%
Federal		1,735	1,785	50	2.9%

*Includes only employment covered by the Unemployment Insurance Program.

**Standard Industrial Classification

***These values represent a very small portion of wage/salary employment for this industry.

0 indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.60

UNEMPLOYMENT RATE -- MISSOULA REGION

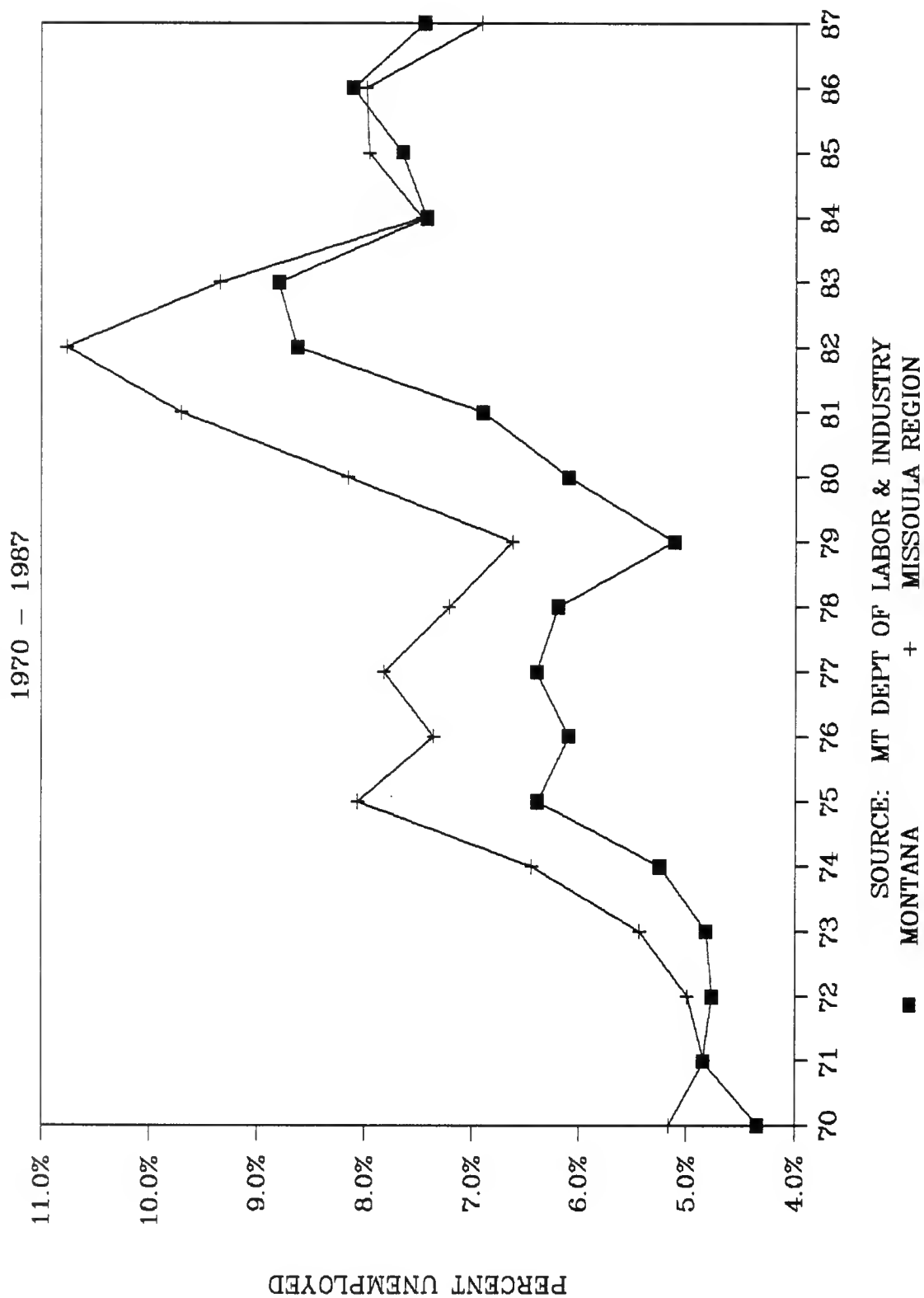
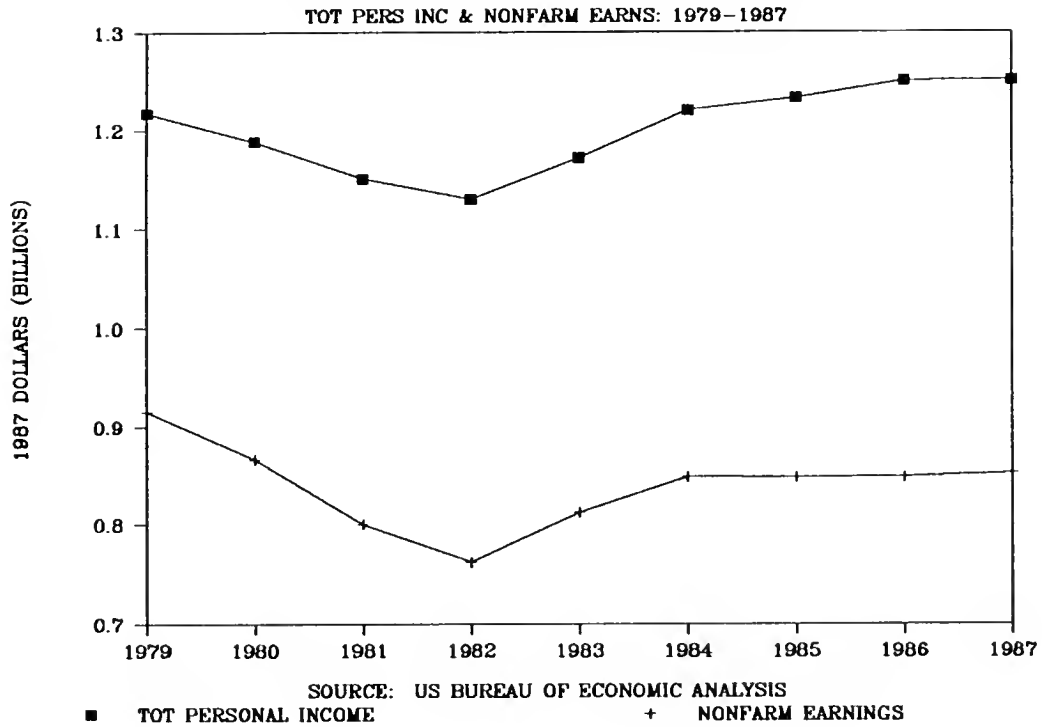
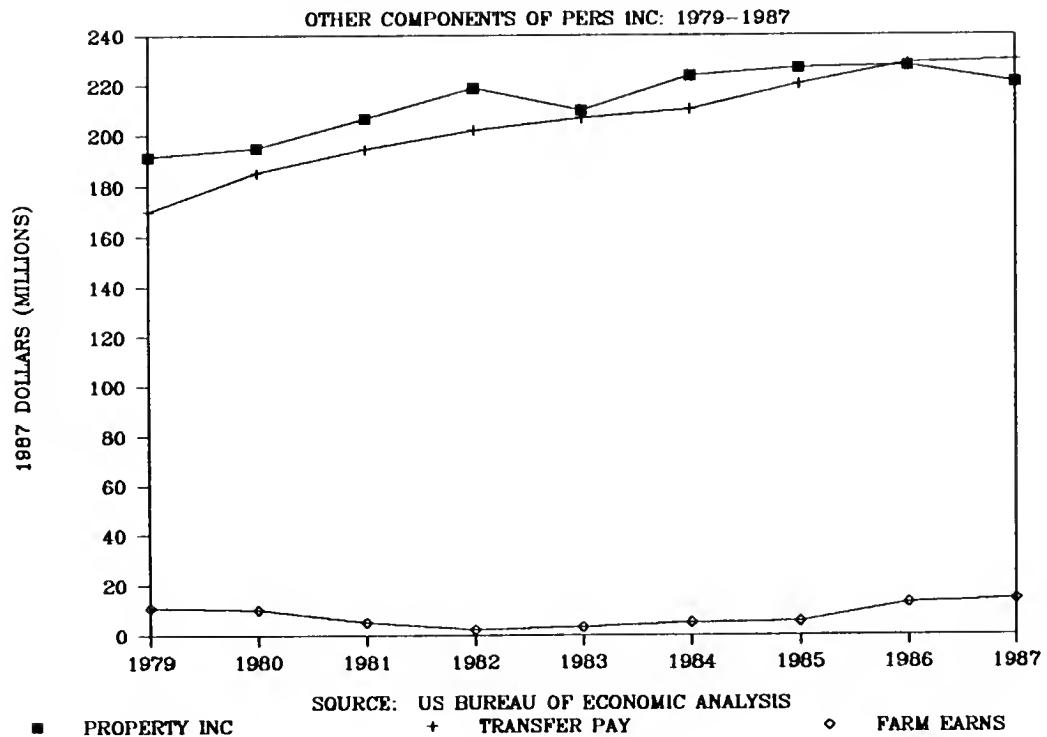


Figure 2.61

INCOME -- MISSOULA REGION



INCOME -- MISSOULA REGION



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